



501 PR342: Processing Requisitions

Web Based Training



Welcome

Welcome to Cardinal Training!

This training provides employees with the skills and information necessary to use Cardinal. It is not intended to replace existing Commonwealth and/or agency policies.

This course provides information on the Requisition process in Cardinal.

These training materials include diagrams, charts, screenshots, etc. that clarify various Cardinal tasks and processes. The screenshots are taken from Cardinal and show pages that not all users can access. They are included here so you can see how your specific responsibilities relate to the overall transaction or process being discussed. See your agency's Cardinal Security Handbook for a list of available roles and descriptions.





Course Objectives

After completing this course, you will be able to:

- Identify requisition concepts, processes, integration, and interfaces
- Create and submit a requisition in the Purchasing and the eProcurement modules
- Maintain a requisition in the Purchasing and the eProcurement modules





Course Topics

This course includes the following topics:

- Lesson 1: Understanding Requisitions
- Lesson 2: Creating a Regular Requisition
- Lesson 3: Creating an eProcurement Requisition
- Lesson 4: Maintaining a Requisition
- Lesson 5: Processing Requisitions Hands-On Practice



Lesson 1: Understanding Requisitions

This lesson covers the following topics:

- Procurement Overview
- Key Concepts
- Requisition Basics
- Requisition Process
- Integration within Procurement
- Requisition Suppliers
- Interfaces with WebIMS and FleetFocus M5



Procurement Overview

The Procurement functional area of Cardinal includes four modules:

Purchasing

The Purchasing module includes the buying of goods and services (Procurement) by creating and processing requisitions, purchase orders (PO), receipts, procurement card (PCard), and Integrated Supply Services Program (ISSP) transactions.

eProcurement

Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.

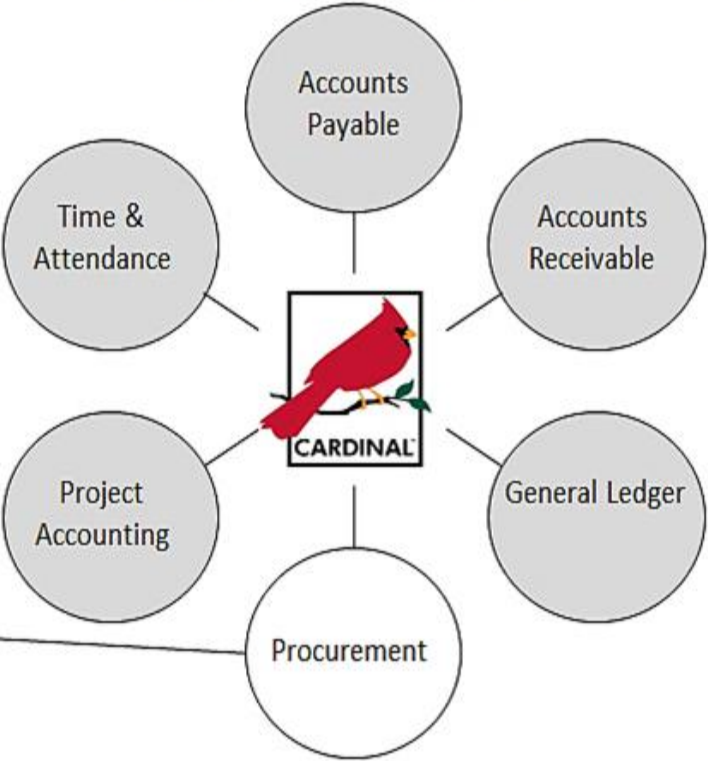
Strategic Sourcing

The Strategic Sourcing module allows users to create and award bids / proposals to purchase orders or contracts.

Procurement Contracts

The Procurement Contracts module builds, manages, and archives all Cardinal contract related information.

Cardinal Functional Areas



Modules

	Purchasing	
	eProcurement	
	Strategic Sourcing	
	Procurement Contracts	



- Add / Update Requisitions
- Create Strategic Sourcing Events
- Add / Update Contracts
- Add / Update Purchase Orders
- Add / Update Receipts
- Procurement Card Processing
- Integrated Supply Services Program (ISSP) Processing







Key Concepts

Key concepts include:

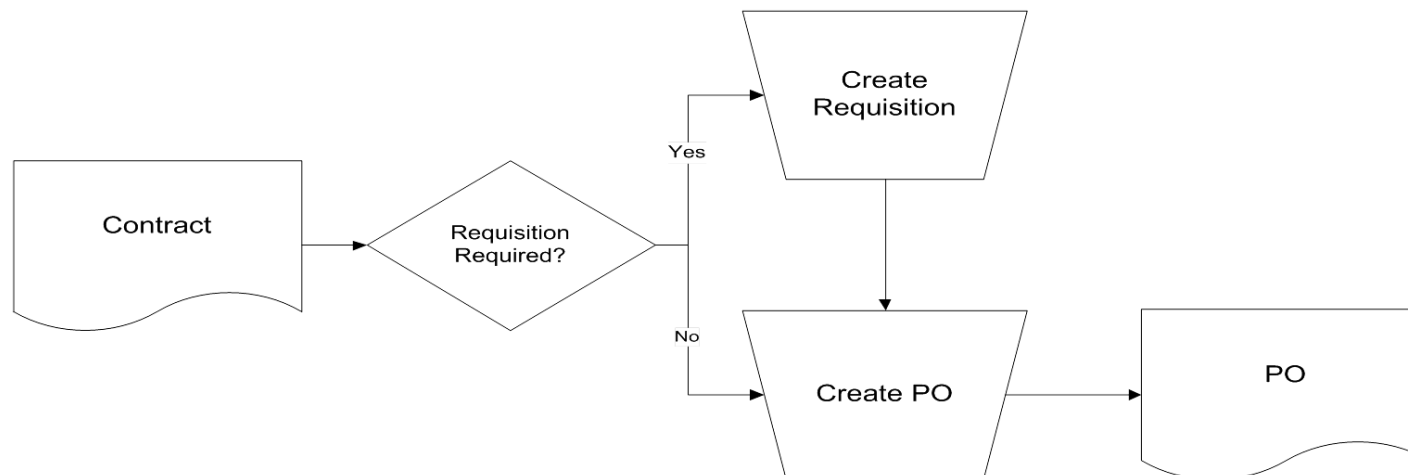
- A requisition is a request for goods and/or services. Requisitions are used to identify and quantify the need for a good or service and document the approval. Once approved, a requisition is sourced to a purchase order (PO) or a sourcing event - Invitation for Bid (IFB) or Request for Proposal (RFP).
- A requisition may be created using either the Purchasing or eProcurement module. However, eProcurement requisitions are not used for the web inventory management system (IMS) restock or issuances.
- Cardinal users share a centralized supplier database maintained by the Commonwealth Vendor Group (CVG). A supplier must be recorded in the statewide supplier database before you can use the supplier on a Cardinal transaction (e.g., requisition, purchase order, sourcing event, voucher, payment).
- eVA, the Commonwealth's web-based procurement system, is the source of procurement supplier information in Cardinal. Procurement suppliers are interfaced from eVA to Cardinal via a nightly interface. Non-procurement suppliers, also known as fiscal suppliers, are created directly in Cardinal by CVG.



Requisition Basics

Requisition Basics:

- Any user can create a requisition. However, only a Buyer can create a purchase order or a sourcing event for the requisition. POs commit the agency to procuring the goods and/or services.
- Purchases in Cardinal must have a PO, but not all POs need a requisition. If a good or a service is already on contract, a requisition is not generally required. You can create a PO against the contract and avoid additional steps.
- Inventory issue and restock transactions must be done using a requisition in the Purchasing module. The data from the requisition is loaded in WebIMS to track inventory quantities.

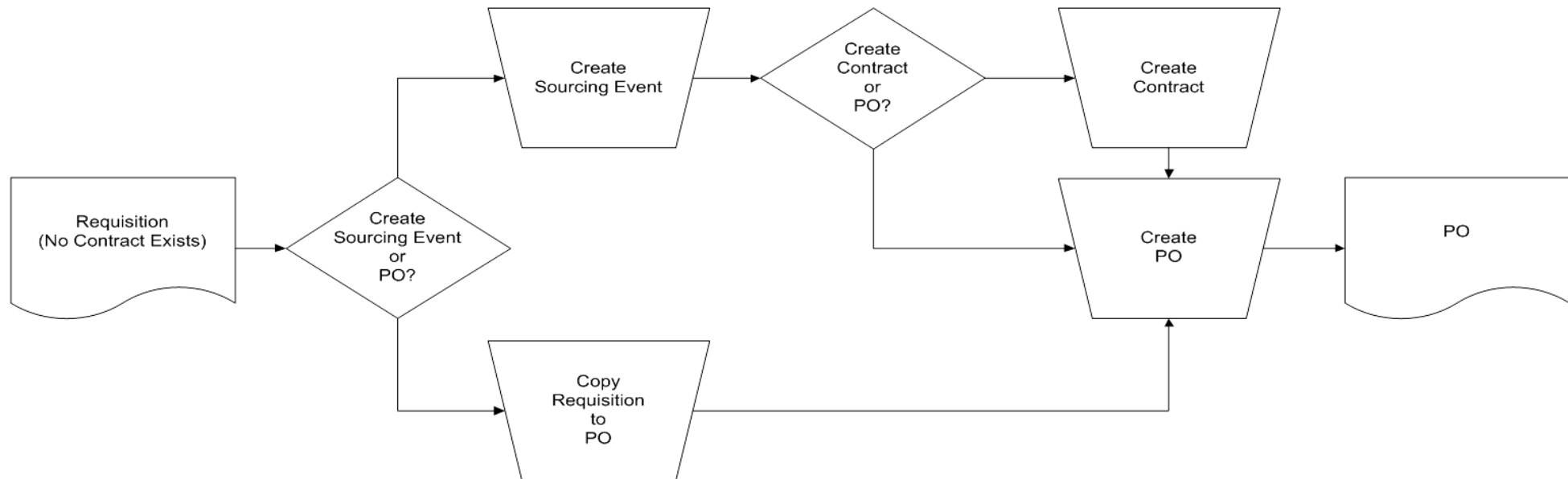


Please refer to the course entitled **501 PR347: Inventory Issuances and Restock** for additional details on creating inventory and restock requisitions.



Requisition Basics (continued)

- If a requisition is created and there is no contract with a supplier, you have two options:
 1. **Create a Sourcing Event:** Once approved, the requisition goes through a solicitation process, which involves creating a sourcing event. This process allows suppliers to bid against the event. Winning bidders are awarded a contract or purchase order.
 2. **Copy the Requisition to a Purchase Order:** When the value of goods or services falls within the range of a small purchase or is otherwise permitted, the Buyer can copy the requisition directly into the purchase order, rather than creating a sourcing event and awarding a contract.





Requisition Basics (continued)

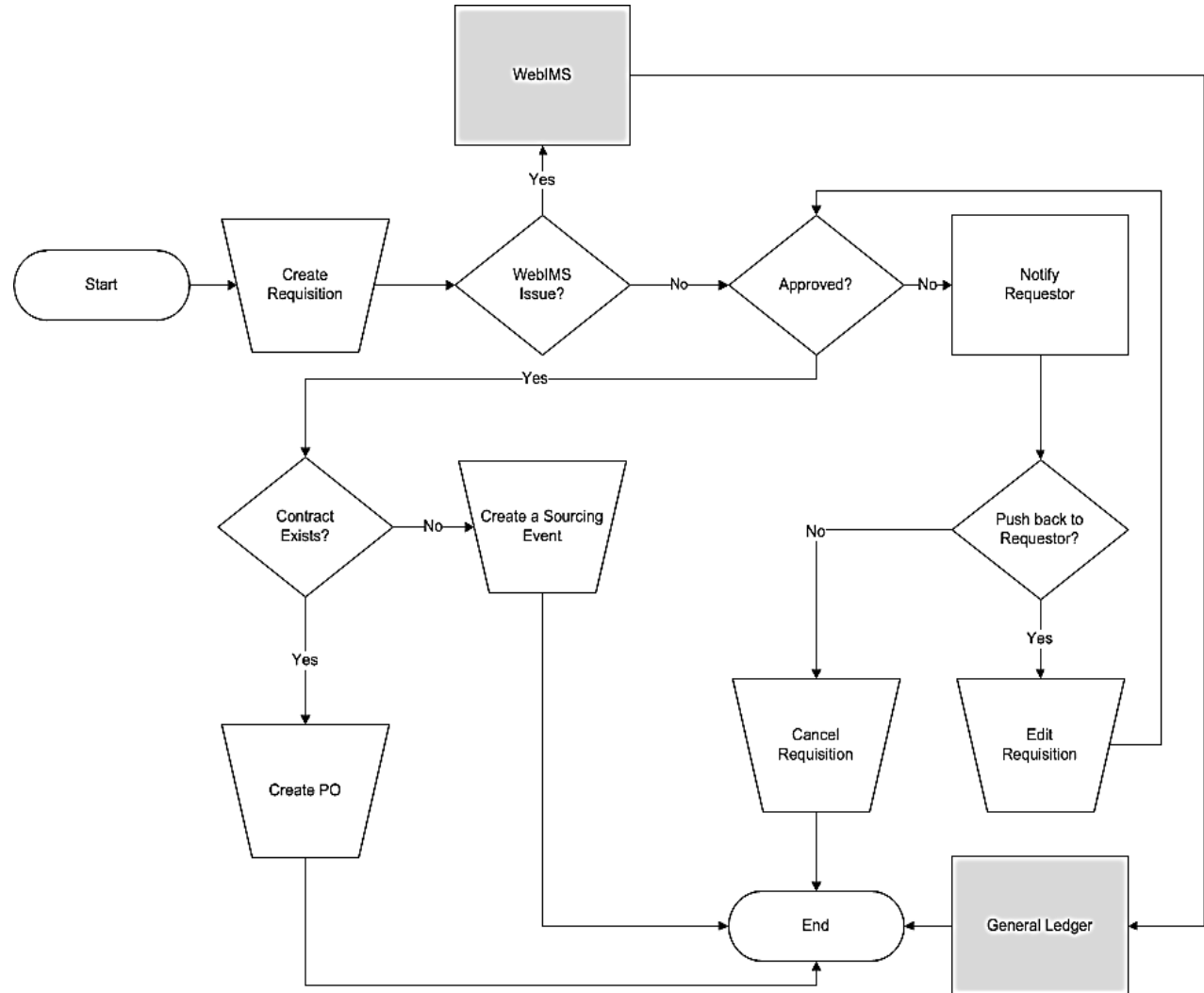
- Requisitions can be set to amount only or quantity. Using amount allows for the receipt by amount.
- When creating a requisition, you may not know which supplier you want to use. This information is only mandatory for contracts and purchase orders.
- eVA Direct Orders (DOs) are loaded directly into Cardinal and purchase orders are created.



Requisition Process

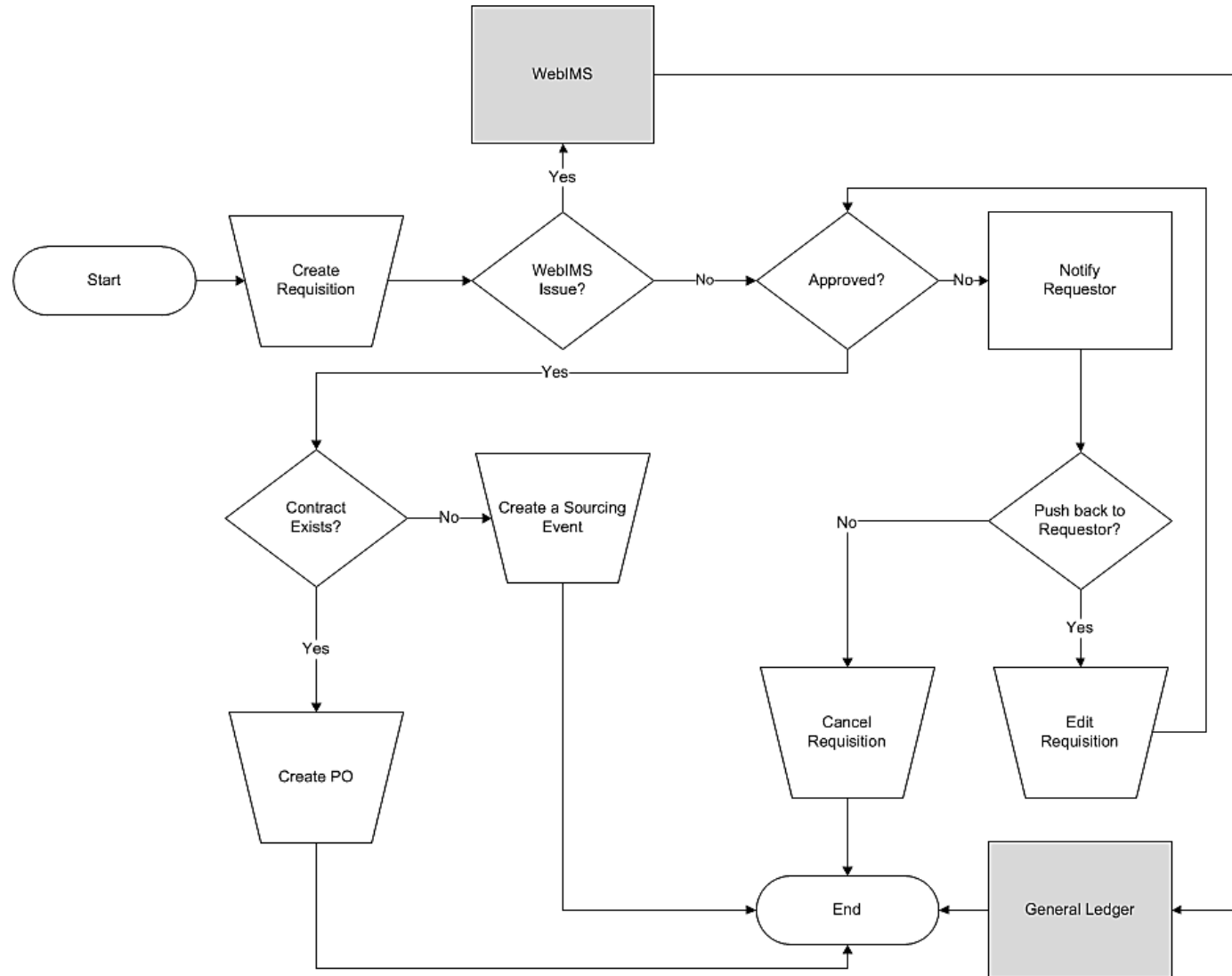
Entering and maintaining requisitions includes:

- Create requisition
- If a contract does not exist, create a sourcing event
- If a contract does exist, create a purchase order by copying the requisition
- Edit requisition
- Cancel requisition





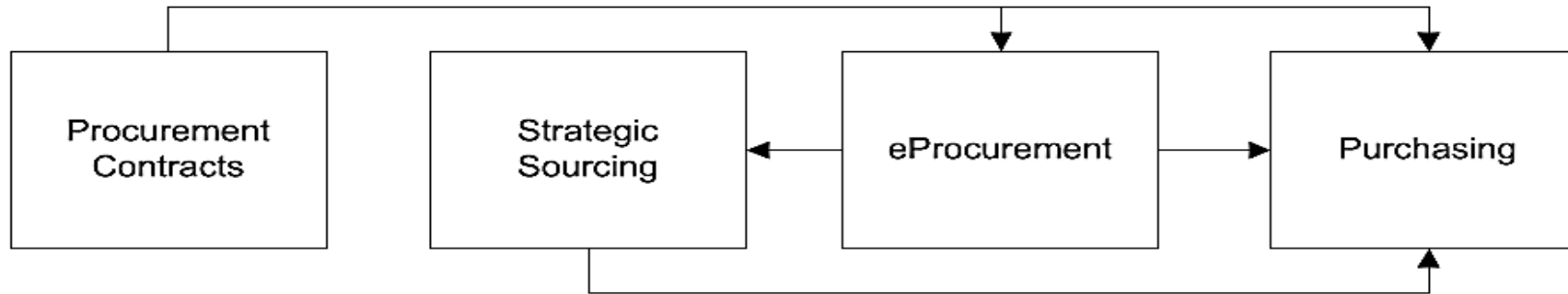
Requisition Process (continued)





Integration within Procurement

Processing a requisition involves the interaction of several modules within the Procurement functional area.

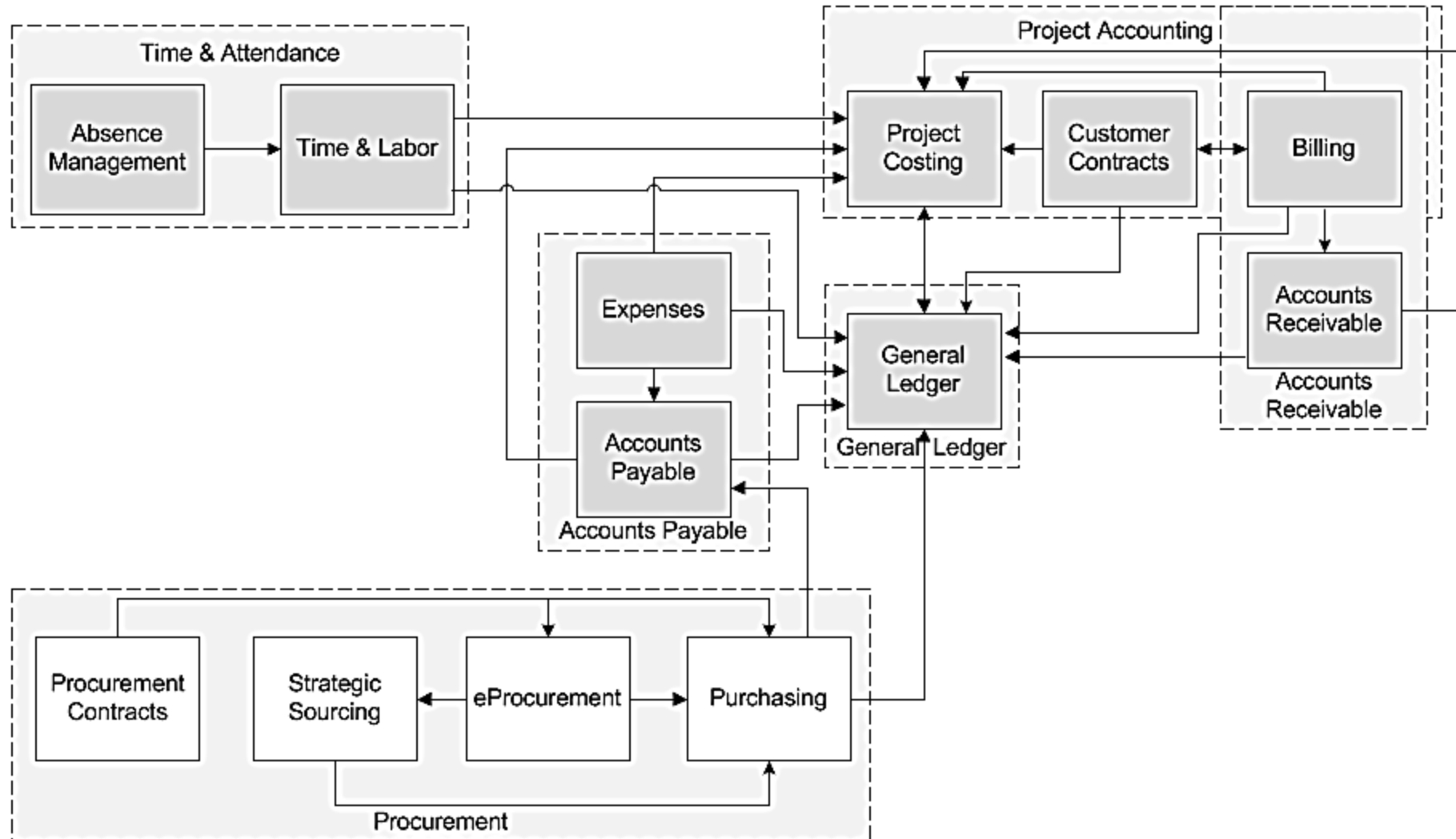


Requisitions interact with Purchasing, Procurement Contracts, Strategic Sourcing, and eProcurement modules:

- **Purchasing / eProcurement:** Requisitions are created in either module.
- **Purchasing:** A requisition can be sourced into a purchase order. Purchase orders are managed in the Purchasing module.
- **Procurement Contracts:** A requisition can be sourced from an established contract. Contracts are managed in the Procurement Contracts module.
- **Strategic Sourcing:** A requisition can be sourced to an event. The event will go through a bid process (solicitation) in the Strategic Sourcing module.



Integration within Procurement (continued)





Requisition Supplier: eVA and CVG

When creating a requisition, you search for a supplier to add to the requisition. All suppliers are shared across the Commonwealth in one centralized database maintained by the Commonwealth Vendor Group (CVG).

A supplier must be added to Cardinal before it can be used on a requisition, purchase order, sourcing event, voucher or payment. However, in creating a requisition, the supplier is not a required field. This can be added later on the purchase order.

eVA updates procurement supplier information through a nightly interface into Cardinal. Non-procurement suppliers, also known as fiscal suppliers, are created directly in Cardinal by CVG.

eVA Direct Orders (DOs) are loaded directly into Cardinal and purchase orders are created.



Interfaces with WebIMS and FleetFocus M5

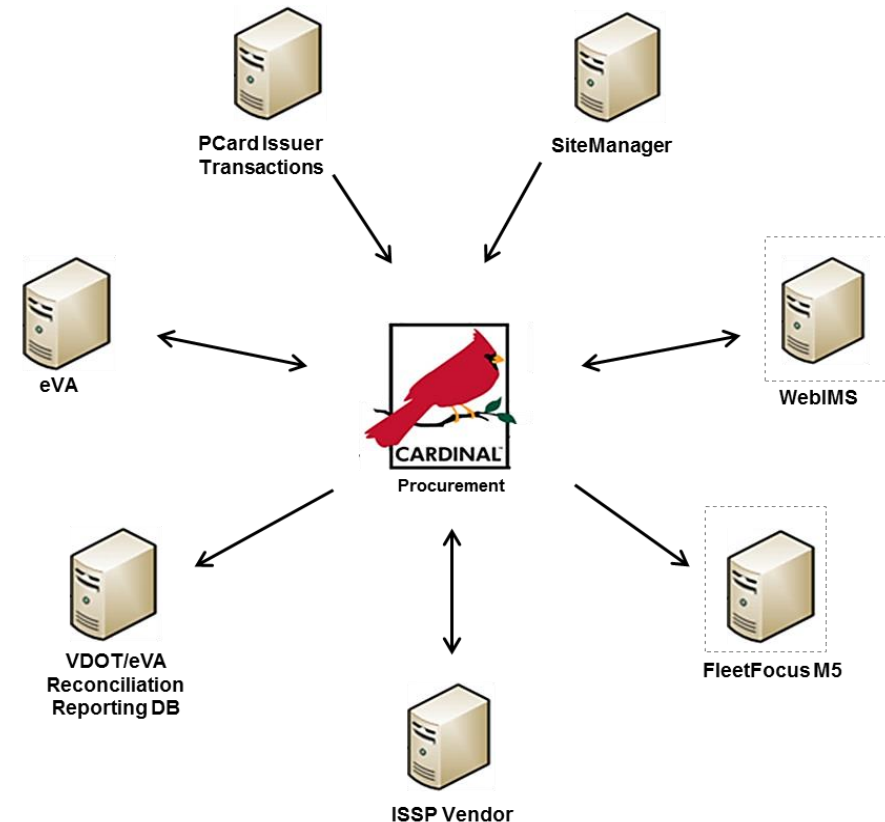
WebIMS:

Stock Issuance: When processing an issuance of stock, a Storekeeper / Requisitioner can order stock items from the web inventory system (WebIMS). WebIMS sends a notification to the Storekeeper alerting them of the status of the order and the document ID (**Doc ID**). WebIMS decrements inventory on hand.

Stock Reorder: The Storekeeper can reorder stock for WebIMS by creating a restock type requisition. The restock requisition creates a **Doc ID** and sets flags for the related purchase orders and receipts. Upon getting a receipt tied to a restock requisition, a **Doc ID** is created and interfaced with the quantity to WebIMS to increase quantity on hand.

FleetFocus M5:

FleetFocus M5 is VDOT's equipment management system which tracks equipment mileage / hours, maintenance, and repair history. In Cardinal, requisitions are created for repairs / parts and FleetFocus M5 records the repair history.



When would an end user create a requisition?

- ☐ When the item is not on contract
- ☐ When a request needs an RFQ (Request for Quote)
- ☐ When the item is on a contract
- ☐ All of the above

When processing a requisition, which external systems specifically interface with the requisition?

- ☐ WebIMS and FleetFocus M5
- ☐ eVA
- ☐ Fleet Focus M5
- ☐ B and C

Does a requisition require approval before it is sent to a Buyer?

- ☐ Yes
- ☐ No



Lesson 1: Summary

In this lesson, you learned about:

- Procurement
- Requisition key concepts
- Requisition basics
- Two ways to initiate a requisition: Purchasing and eProcurement modules
- Procurement suppliers
- The ways requisitions integrate with other Cardinal modules
- The ways requisitions interface with external systems: WebIMS and FleetFocus M5



Lesson 2: Creating a Regular Requisition

This lesson covers the following topics:

- Create a Requisition in the Purchasing Module
- Add Items
- Requisition Lines
- Requisition Schedules



Create a Requisition in the Purchasing Module

When you create a regular requisition in the Purchasing module, you may customize it to fit your needs.

To create a requisition in the Purchasing module you navigate to the **Maintain Requisitions – Requisition** page using the following path:

Main Menu > Purchasing > Requisitions > Add/Update Requisitions

From the **Add a New Value** tab click **Add**.

The **Maintain Requisitions – Requisition** page displays.

The **Header** section contains some key data including **Requester**, **Requisition Date**, and **Origin**.

Cardinal logo and search bar at the top. Navigation menu: Favorites, Main Menu, Purchasing, Requisitions. Section: Requisitions. Tabs: Find an Existing Value, Add a New Value (highlighted). Input fields: Business Unit (50100), Requisition ID (NEXT). Add button.

Cardinal logo and search bar at the top. Navigation menu: Favorites, Main Menu, Purchasing, Requisitions, Add/Update Requisitions. Section: Maintain Requisitions Requisition. Fields: Business Unit (50100), *WebIMS Req Type (Regular), Status (Open), Requisition ID (NEXT), Requisition Name, Copy From, Hold From Further Processing. Header section (highlighted): *Requester (GEORGE MASON), *Requisition Date (01/15/2017), Origin (ONL), *Currency Code (USD), Requester Info, Online Input, Dollar, Add Comments, Amount Summary (Total Amount: 0.00 USD). Add Items From: Purchasing Kit, Catalog, Item Search, Requisition Items. Table: Line, Item, Description, Quantity, *UOM, Category, Price, Merchandise Amount, Status. Buttons: Save, Notify, Refresh, Add, Update/Display.

For additional details on creating a requisition from a contract or another requisition, please see the job aid entitled **501 PR342 Create Requisitions**. Job aids are located on the Cardinal website.



Create a Requisition in the Purchasing Module (continued)

CARDINAL

All

Search

Advanced Search

Favorites

Main Menu

Purchasing

Requisitions

Add/Update Requisitions

Maintain Requisitions

Requisition

Business Unit50100

*WebIMS Req TypeRegular

StatusOpen

Requisition IDNEXT

Requisition Name

Copy From

Hold From Further Processing

Header

*RequesterGEORGE.MASON

MASON,GEORGE

*Requisition Date01/15/2017

Requester Info

OriginONL

Online Input

*Currency CodeUSD

Dollar

Requisition Defaults

Add Comments

Requisition Activities

Amount Summary

Total Amount0.00 USD

Add Items From

Purchasing Kit

Catalog

Item Search

Requester Items

Line

Details

Ship To/Due Date

Status

Supplier Information

Item Information

Attributes

Contract

Sourcing Controls

WebIMS

Personalize

Find

View All

First

1 of 1

Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000			0	0.00	Open

View Approvals

*Go to ...More...

Save

Notify

Refresh

Add

Update/Display

25



Adding Items

You can add items using either **Item ID** or **Category** to your requisition in multiple ways.

- Key in, or look up, the National Institute of Governmental Purchasing (NIGP) Item number, i.e., **Item**. This is the most common method to select an **Item**. On each line, click on the magnifying glass next to the **Item** field. The items listed will be narrowed down to items related to the supplier you previously selected. The **UOM** and **Description** field values default from the item table.
- Key in or look up the NIGP Category, i.e. **Category**. On each line, click on the magnifying glass next to the **Category** field. This method will not be limited to items related to the chosen supplier. You will need to complete the **UOM** and **Description** fields. These fields become available for entry after the **Category** is selected.

Maintain Requisitions

Requisition

Business Unit 50100

*WebIMS Req Type Regular

Status Open

Requisition ID NEXT

Requisition Name

Copy From

Hold From Further Processing

Header

*Requester GEORGE.MASON

*Requisition Date 01/15/2017

Origin ONL

*Currency Code USD

MASON,GEORGE

Requester Info

Online Input

Dollar

Requisition Defaults

Add Comments

Amount Summary

Total Amount 50.00 USD

Add Items From

Purchasing Kit

Catalog

Item Search

Requester Items

Line

Details

Ship To/Due Date

Status

Supplier Information

Item Information

Attributes

Contract

Sourcing Controls

Personalize

Find

View All

WebIMS

First

1-2 of 2

Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	0051404115	ABRASIVES,	2.0000	RO	0051404	25.00000	50.00	Open
2			0.0000			0	0.00	Open



Adding Items (continued)

- Use the **Item Search** hyperlink to search by **Category**, **Description**, or **Item ID**.
- Use the **Requester Items** hyperlink, which lists items the Requester has previously requested.
- The **Purchasing Kit** and **Catalog** hyperlinks are not generally used.

CARDINAL All Search Advanced Search

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions

Maintain Requisitions

Requisition

Business Unit 50100 *WebIMS Req Type Regular Status Open ☒

Requisition ID NEXT

Requisition Name Copy From ☐ Hold From Further Processing

Header

*Requester GEORGE.MASON MASON,GEORGE
*Requisition Date 01/15/2017 Requisition Info
Origin ONL Online Input
*Currency Code USD Dollar

Requisition Defaults Add Comments
Requisition Activities

Amount Summary

Total Amount 50.00 USD

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1	0051404115	ABRASIVES,	2.0000	RO	0051404	25.00000	50.00	Open				
2			0.0000			0	0.00	Open				

View Approvals *Go to ...More...

Save Notify Refresh Add Update/Display



Adding Items (continued)

Helpful Hints for Items:

- On the **Maintain Requisitions – Requisition** page, the **Item Information** tab allows you to enter specific Supplier Item information, e.g., Grainger Catalog, Version 13, pg. 6, Item # XXXXXX.
- For VDC (Virginia Distribution Center) related items, use the **Manufacturer's Item ID** field to insert VDC stock item number.
- To specify a District/CO and District/Division location, use the **Manufacturer ID** and **Manufacturer's Item ID**.

Add Items From ?

Purchasing Kit
Item Search

Catalog
Requester Items

Line ?

Personalize | Find | View All | | First 1 of 1 Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	WebIMS		
Line	Item	Description	GTIN	RFQ Required	Device Tracking	Supplier Item ID	Supplier's Catalog	Manufacturer ID	Manufacturer's Item ID	
1	0051404115	ABRASIVES,		<input type="checkbox"/>	<input type="checkbox"/>				920253	

View Approvals

*Go to ...More...

Save Notify Refresh

Add Update/Display



Adding Items (continued)

All Search Advanced Search

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions

Maintain Requisitions

Requisition

Business Unit 50100

*WebIMS Req Type Regular

Status Open

Requisition ID NEXT

Requisition Name Copy From

☐ Hold From Further Processing

Header

*Requester GEORGE.MASON

MASON,GEORGE

*Requisition Date 01/15/2017

Requester Info

Origin ONL

Online Input

*Currency Code USD

Dollar

Requisition Defaults

Add Comments

Requisition Activities

Amount Summary

Total Amount 50.00 USD

Add Items From

Purchasing Kit

Catalog

Item Search

Requester Items

Line

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls WebIMS

Personalize Find View All First 1 of 1 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	0051404115	ABRASIVES,	2.0000	RO	0051404	25.00000	50.00	Open

View Approvals

*Go to ...More...

Save

Notify

Refresh

Add

Update/Display



Requisition Lines

In **Line** section there are multiple tabs which contain information: **Details**, **Ship To / Due Date**, **Status**, **Supplier Information**, **Item Information**, **Attributes**, **Contract**, **Sourcing Controls**, and **WebIMS** (for WebIMS-related requisitions).

In addition, you may insert line specific **Comments** or **Attachments** (specs, images, etc.) using the **Line Comments** icon. Click the **Line Comments** icon.

CARDINAL All Search Advanced Search

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions

Maintain Requisitions
Requisition

Business Unit 50100 *WebIMS Req Type Regular Status Open ☒

Requisition ID NEXT

Requisition Name Copy From ☐ Hold From Further Processing

Header ?

*Requester GEORGE.MASON MASON,GEORGE

*Requisition Date 01/15/2017 Requisition Info

Origin ONL Online Input

*Currency Code USD Dollar

Requisition Defaults Add Comments

Requisition Activities

Amount Summary ?

Total Amount 50.00 USD

Add Items From ?

Purchasing Kit Catalog

Item Search Requester Items

Line ? Personalize Find View All First 1 of 1 Last

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls WebIMS

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	0051404115	ABRASIVES,	2.0000	RO	0051404	25.00000	50.00	Open

View Approvals *Go to ...More...

Save Notify Refresh Add Update/Display



Requisition Lines (continued)

All Search Advanced Search

Favorites Main Menu > Purchasing > Requisitions > Add/Update Requisitions

Maintain Requisitions

Requisition

Business Unit 50100

*WebIMS Req Type Regular

Status Open

Requisition ID NEXT

Requisition Name Copy From

☐ Hold From Further Processing

Header

*Requester GEORGE.MASON

MASON,GEORGE

*Requisition Date 01/15/2017

Requester Info

Origin ONL

Online Input

*Currency Code USD

Dollar

Requisition Defaults

Add Comments

Requisition Activities

Amount Summary

Total Amount 50.00 USD

Add Items From

Purchasing Kit

Catalog

Item Search

Requester Items

Line

Personalize Find View All

First 1 of 1 Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	WebIMS
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	0051404115	ABRASIVES,	2.0000	RO	0051404	25.00000	50.00	Open

View Approvals

*Go to ...More...

Save

Notify

Refresh

Add

Update/Display



Requisition Lines (continued)

The **Line Comments** page allows you enter comments, add attachments, or access and use standard comments that are pre-loaded in the system.

Line Comments

Help

Business Unit 50100

Requisition ID NEXT

Requisition Date 01/15/2017

Status Open

Line 1

*Sort Method

Comment Time Stamp

*Sort Sequence

Ascending

Sort

Comments

Find | View All

First

1 of 1

Last

Use Standard Comments

Use Item Specifications

Comment Status Active

Inactivate

☐ Send to Supplier

☐ Show at Receipt

☐ Show at Voucher

Associated Document

Attachment

Attach

View

Delete

☐ Email

From -> REQ 50100-NEXT

OK

Cancel

Refresh



Requisition Lines (continued)

Amount Only:

The requested goods or services may be a single total amount and/or invoiced in different amounts (not quantities). Using the **Maintain Requisitions – Requisition** page, on the **Attributes** tab under the **Line** section, **Amount Only** may be selected. Requesting and ordering using **Amount Only** allows the line to be received only by invoiced amount (dollars) instead of by quantity.

Maintain Requisitions

Requisition

Business Unit 50100

*WebIMS Req Type Regular

Status Open

Requisition ID NEXT

Requisition Name

Copy From

Hold From Further Processing

Header

*Requester GEORGE.MASON

MASON,GEORGE

*Requisition Date 01/15/2017

Requester Info

Origin ONL

Online Input

*Currency Code USD

Dollar

Requisition Defaults

Add Comments

Requisition Activities

Amount Summary

Total Amount 50.00 USD

Add Items From

Purchasing Kit

Catalog

Item Search

Requester Items

Line

Details

Ship To/Due Date

Status

Supplier Information

Item Information

Attributes

Contract

Sourcing Controls

WebIMS

Personalize

Find

View All

First

1-2 of 2

Last

Line	Item	Description	Buyer	Name	Physical Nature	Zero Price Indicator	Amount Only	Inspection Required	Inspect ID
1	0051404115	ABRASIVES,	GEORGE.MASON	MASON,GEORGE	Goods		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2					Goods		<input type="checkbox"/>	<input type="checkbox"/>	

View Approvals

*Go to ...More...

Save

Notify

Refresh

Add

Update/Display



Requisition Lines (continued)



Amount Only (continued):

Amount Only Example: We have a requisition for the installation of two storage units. Each unit will have a fixed price, but the supplier may bill for odd amounts during the project. **Amount Only** will allow you to receive the actual invoice amount, instead of a percent of each storage unit.

When you click the **Amount Only** checkbox:

- The **Quantity** is set to **1** for an amount only line and **Quantity** becomes unavailable for entry. The line is repriced accordingly.
- The **Price** field on the line is available for entry.
- The **Price** you enter becomes the schedule price and amount.
- The **Distribute By** field, located on the **Distribution** page, is set to **Amount** and cannot be modified.

Line ?

Personalize | Find | View All |  |  First 1-2 of 2 Last

Details

Ship To/Due Date

Status

Supplier Information


Item Information























Attributes

Contract

Sourcing Controls

WebIMS



Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1	 0051404115 	ABRASIVES,  	 1.0000	RO 	0051404	15.00000	15.00	Open					
2	 0051417550 	CLOTHS, ABRASIVE,  	 3.0000	PK 	0051417	10.00000	30.00	Open					

To view the **Distribute By** field and ChartField distribution for a line, from the **Details** tab click the **Schedule** icon.



Requisition Lines (continued)

Amount Only (continued):

From the **Schedule** page click on the distribution icon.

All

Search

>>

Advanced Search

Favorites

Main Menu

Purchasing

Requisitions

Add/Update Requisitions

Maintain Requisitions

Schedule

Business Unit50100

Requisition Date01/15/2017

Requisition IDNEXT

StatusOpen

Return to Main Page

Line

Find | View All

First

1 of 2

Last

1	Item 0051417548	CLOTHS, ABRASIVE, EMERY, 9 IN.	Quantity	1.0000	Each	Merchandise Amt	15.00	USD
---	-----------------	--------------------------------	----------	--------	------	-----------------	-------	-----

Schedule

Personalize | Find | View All |

First

1 of 1

Last

Details

Sched		*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To		Status
1		CTRL	1.0000	15.00000	15.00		MASON,GEOR		Active

Add Ship To Comments

Save

Notify

Refresh

Add

Update/Display



Requisition Lines (continued)

Amount Only (continued):

The **Distribute By** field, located on the **Distribution** pop-up window, is set to **Amount** and cannot be modified.

Distribution Details

Help

Maintain Requisitions

Distribution

Requisition ID NEXT

Line 1

Schedule 1

Ship To CNTRL OFF3

*Distribute By Amount

SpeedChart

Item 0051417548

Status Active

CLOTHS, ABRASIVE, EMERY, 9 IN.

Quantity 1.0000 EA

Open Amount 15.000

Merchandise Amt 15.00 USD

Distributions

Chartfields

Details

Asset Information

Distrib	Status	Percent	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	PC Bus Unit	Project	Activity
1	Open	100.0000	15.00	50100		5013540												

OK

Cancel

Refresh

Click **OK** to return to the **Schedule** page.



Requisition Schedules

The schedule information defines when and where you want the item delivered and when it is due. On the **Schedule** page, the **Ship To** location should default per the user's set-up. These fields can be edited as necessary. Do not enter more than one schedule, i.e., **Ship To** location, for a line. The interface with eVA does not permit such an action and will cause the subsequent PO to error out. Create another line for each separate schedule required.

From the **Schedule** page, click the **Distribution** icon to enter accounting distributions.

All Search >> Advanced Search

Favorites Main Menu > Purchasing > Requisitions > Add/Update Requisitions

Maintain Requisitions

Schedule

Business Unit 50100 Requisition Date 01/15/2017

Requisition ID NEXT Status Open

Return to Main Page

Line

Find | View All First 1 of 2 Last

1 Item 0051417548 CLOTHS, ABRASIVE, EMERY, 9 IN. Quantity 1.0000 Each Merchandise Amt 15.00 USD

Schedule

Personalize | Find | View All | First 1 of 1 Last

Details

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CNTRL	1.0000	15.00000	15.00		MASON, GEORGE	Active

Add Ship To Comments

Save Notify Refresh

Add Update/Display



Requisition Schedules (continued)

A **Schedule** may have one or more **ChartField** distributions. The **ChartField** values identify the accounting distribution. The insertion of valid **Account**, **Department**, **Cost Center**, or **Project** values are required. You can manually enter a ChartField value, or you can use the **Multi-SpeedCharts** hyperlink to select a **SpeedChart** value to automatically populate some of the ChartField values for you.

You may insert, or delete, additional accounting distributions, by scrolling right and clicking on the **+ / -** icons at the end of the accounting distribution line.

Distribution Details

Maintain Requisitions

Distribution

Requisition ID NEXT

Line 1

Schedule 1

Ship To CNTRL OFF3

CNTRL OFF3

*Distribute By Amount

SpeedChart

Multi-SpeedCharts

Item 0051417548

Status Active

CLOTHS, ABRASIVE, EMERY, 9 IN.

Quantity 1.0000 EA

Open Amount 15.000

Merchandise Amt 15.00 USD

Distributions

Chartfields

Details

Asset Information

Distrib	Status	Percent	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task	FIPS
1	Open	100.0000	15.00	50100		5012550	04100	699001	10003	11120010		

OK

Cancel

Refresh



Requisition Schedules (continued)

You are able to add or delete a line using the **+/-** icons next to an existing line, and edit any part of the requisition, as you build it. Once **Saved**, click the **Submit for Approval** checkbox, which is next to the **Status** field, to send it forward for approval by your Supervisor.

CARDINAL

All

Search

Advanced Search

Favorites

Main Menu

Purchasing

Requisitions

Add/Update Requisitions

Maintain Requisitions

Requisition

Business Unit50100

*WebIMS Req TypeRegular

StatusOpen

☒

X

Requisition ID0002175955

Requisition Name0002175955

☐ Hold From Further Processing

Header

*RequesterGEORGE.MASON

MASON,GEORGE

*Requisition Date01/15/2017

Requester Info

OriginONL

Online Input

*Currency CodeUSD

Dollar

Requisition Defaults

Add Comments

Requisition Activities

Document Status

Amount Summary

Total Amount15.00 USD

Add Items From

Purchasing Kit

Catalog

Item Search

Requester Items

Select Lines To Display

Search for Lines

Line

To

Retrieve

Line

Personalize

Find

View All

First

1 of 1

Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	WebIMS
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	0051417548	CLOTHS, ABRASIVE,	1.0000	EA	0051417	15.00000	15.00	Open

View Approvals

*Go to ...More...

Save

Return to Search

Notify

Refresh

Add

Update/Display



Simulation: Creating a Regular Requisition

You are now about to view a simulation that demonstrates how to create a regular requisition. Click the Cardinal logo below to start the simulation.



On a requisition, a line cannot have multiple distributions.

- ☐ True
- ☐ False

The **Amount Only** function sets the line quantity to 1 and allows you to enter a dollar value.

- ☐ True
- ☐ False



Lesson 2: Summary

In this lesson, you learned how to:

- Create a regular requisition using the Purchasing module
- Search for items to add to the requisition in the Purchasing module
- Modify requisitions schedules in the Purchasing module
- Update accounting distributions in the Purchasing module



Lesson 3: Creating an eProcurement Requisition

This lesson covers the following topics:

- Create an eProcurement Requisition
- Create and Use an eProcurement Template



Create an eProcurement Requisition

eProcurement provides a custom navigation center that contains folders that support procurement activities specific to business processes and tasks. eProcurement mimics an online shopping experience.

eProcurement may be used for a regular requisition but is not used for IMS (inventory).

To create an eProcurement Requisition, navigate to the **Create Requisition** page using the following path:

Main Menu > eProcurement > Requisition

Click on the **Request Options** drop-down arrow to view left hand navigation. The navigation and options in the left hand navigation vary by page.

The **Create Requisition** page may also be accessed from any eProcurement page using the **Home** hyperlink which is displayed at the top of every eProcurement page.

The screenshot displays the CARDINAL eProcurement system interface. At the top, the header includes the CARDINAL logo, a welcome message "Welcome to Cardinal!", and a search bar with "All" selected. Below the header, a breadcrumb trail shows "Main Menu > eProcurement > Requisition". The "Create Requisition" link is highlighted with a red box. Below this, the "Request Options" drop-down menu is open, showing a list of options: "All Request Options", "Catalog", "Express Item Entry", "Special Requests", "Forms", "Favorites", "Templates", "ePro Services", and "Recently Ordered". A red arrow points to the "Request Options" drop-down arrow. The main content area displays various procurement options, including "Catalog", "Express Item Entry", "Special Requests", "Forms", "Favorites", "Templates", "ePro Services", and "Recently Ordered".



Create an eProcurement Requisition: Defaults

The first step in creating an eProcurement requisition is to define the default **Requisition Settings**.

Click on the **Requisition Settings** pop-up window to define or confirm the **Business Unit**, **Requester**, **Requisition Name**, **Priority** of the requisition, **Line Defaults**, and **Shipping Defaults**.

Additional default settings include:

- **Line Defaults**
- **Shipping Defaults:** Confirm the **Ship To** location is correct for this requisition. This may also be done by line during checkout.
- **Distribution Defaults:** Accounting Defaults

The screenshot shows the 'Create Requisition' window in the CARDINAL system. The window is titled 'Welcome to Cardinal!' and includes a search bar and navigation links. The 'Main Menu' is highlighted, showing the path: Main Menu > eProcurement > Requisition. The 'Create Requisition' button is also highlighted. The 'Requisition Settings' section is highlighted, showing fields for Business Unit (50100), Requester (PPS1_HELEN.ARDMAN), Requisition Name, and Priority (Medium). The 'Default Options' section is highlighted, showing the 'Default' radio button selected. The 'Line Defaults' section is highlighted, showing fields for Supplier, Supplier Location, Buyer, Category, and Unit of Measure. The 'Shipping Defaults' section is highlighted, showing the 'Ship To' field (CNTRL OFF3) and the 'Due Date' field. The 'Distribution Defaults' section is highlighted, showing the 'SpeedChart' field. The 'Accounting Defaults' section is highlighted, showing a table with columns for Dist, Percent, Location, GL Unit, Entry Event, Account, Fund, Program, Department, and Cost Center. The table contains one row with values: 1, CNTRL OFF3, 50100, and others. The 'OK' and 'Cancel' buttons are at the bottom.



Create an eProcurement Requisition: Defaults (continued)

The **Accounting Defaults** are defined on the **Requisition Settings** pop-up window.

Default Options (Radio Buttons):

- **Default:** As long as no predefined values exist, the values you enter in the Line, Shipping, and Distribution default fields replaces blank fields and are applied to the entire requisition.
- **Override:** If predefined values exist, the value you enter in the Line, Shipping, and Distribution default fields will override the default value for this requisition. However, blank values are not considered an override value and the system will still use the default value on the requisition.

The **Override** radio button enables the SpeedChart option.

Accounting Defaults: On the **ChartFields 1** tab you define the default accounting values to be applied to all requisition lines. Later, at checkout, you can modify or further define accounting values for each individual line if needed.

Requisition Settings

Business Unit: 50100 VA Dept of Transportation Requisition Name: [blank]
Requester: PPS1_HELEN.ARDMAN ARDMAN, HELEN Priority: Medium
*Currency: USD

Default Options

☐ Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
☒ Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults

Supplier: [blank] Category: [blank]
Supplier Location: [blank] Unit of Measure: [blank]
Buyer: [blank]

Shipping Defaults

Ship To: CNTRL OFF3 Add One Time Address
Due Date: [blank] Attention: [blank]

Distribution Defaults

SpeedChart: [blank]

Accounting Defaults

ChartFields1 Details Asset Information [REDACTED]

Dist	Percent	Location	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center
1	100.0000	CNTRL OFF3	50100	[blank]	5012550	04100	899001	10003	11120010

OK Cancel

Click the **OK** button to accept the edits, close the pop-up window, and return to the **Create Requisition** page.



Create an eProcurement Requisition: Defaults (continued)

Create Requisition ?

Welcome AF

Requisition Settings

Business Unit50100VA Dept of TransportationRequisition Name

RequesterPPS1_HELEN.ARDMANARDMAN, HELENPriorityMedium

*CurrencyUSD

Default Options ?

☐ Default

If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

☒ Override

If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults ?

SupplierCategory

Supplier LocationUnit of Measure

Buyer

Shipping Defaults

Ship ToCNTRL OFF3Add One Time Address

Due DateAttention

Distribution Defaults

SpeedChart

Accounting Defaults

Personalize | Find | 1 of 1 | Last

Chartfields1DetailsAsset Information

Dist	Percent	Location	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center
1	100.0000	CNTRL OFF3	50100		5012550	04100	899001	10003	11120010

OK

Cancel

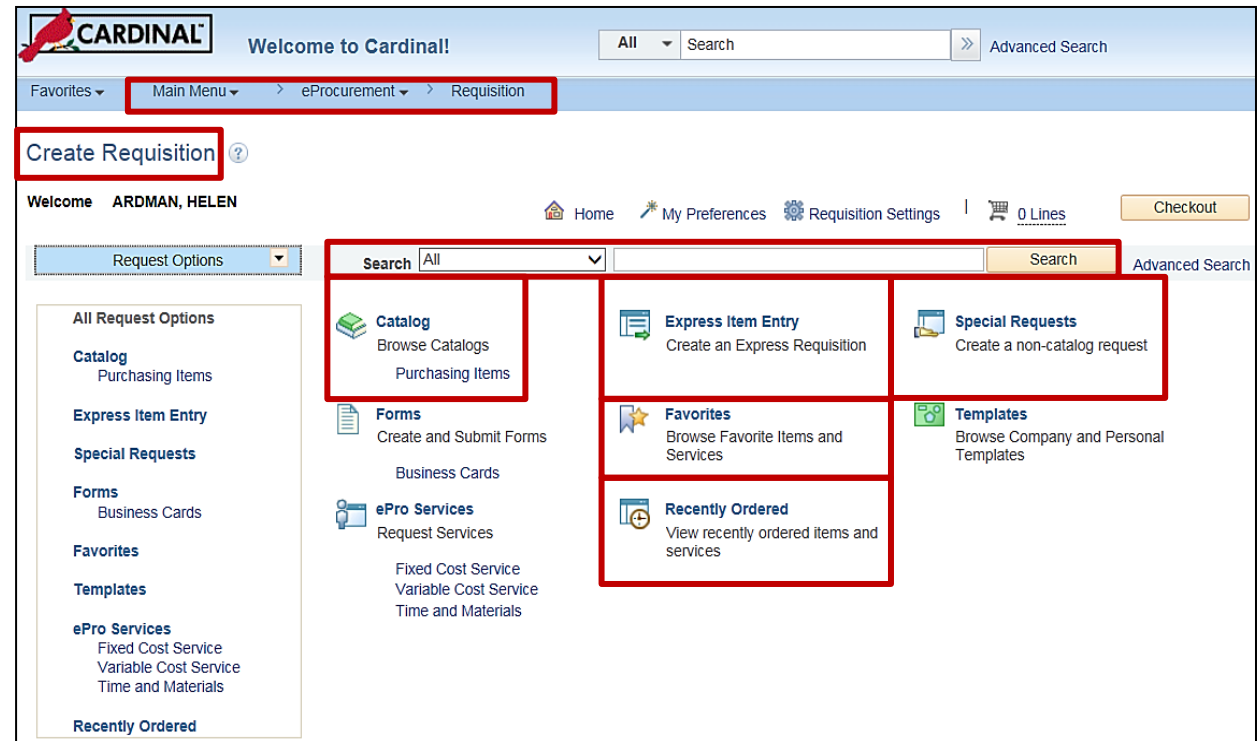


Add Items and Services

The second step in creating an eProcurement requisition is adding items and services. This can be done from the eProcurement **Home** page, i.e., **Create Requisitions** page, using the main page or the left hand navigation hyperlinks.

From the **Create Requisition** page, you may search for items or services to add to your shopping cart by clicking on one of the following hyperlinks or using the main search feature at the top of the page:

- **Catalog**
- **Express Item Entry**
- **Favorites**
- **Recently Ordered**
- **Special Requests**





Add Items and Services: Searches

At the top of the page is a global search option. Using the drop down arrow you can choose to search the **Catalog**, your **Favorites**, or everywhere (**All**). Click on the **Advanced Search** hyperlink and a pop-up window with additional search criteria will be displayed. To initiate a search, type the item number or name in the box to the left of the **Search** button or in the search criteria on the pop-up window. Click the **Search** button to kick off the search.

The % character can be used as a wildcard in global searches when preceded by another character.

The screenshot displays the Cardinal eProcurement interface. The top navigation bar includes links for Home, My Preferences, Requisition Settings, 0 Lines, and Checkout. The main content area shows a search results page for the query "3204%38%". The search criteria are set to "All" and the results are sorted by Description. The results list includes items such as "NUTS, FINISHED, MEDIUM CARBON STEEL, REGULAR, DOUBLE CHAMFER 1 IN. - 8" and "NUTS, JAM, STEEL 1 IN. S.A.E., TIFCO NO. 22-147 OR EQUAL".

An "Advanced Search" pop-up window is overlaid on the right side of the screen. It contains a "Search Name" field, a "Search" button, and a "Search By Contract ID" section. The "Advanced Search" section includes a "Search Contains" dropdown menu and a list of search fields: Description, Manufacturer, Manufacturer ID, Supplier, Supplier ID, Item ID, Model, GTIN, Category ID, Supplier Item ID, Manufacturer Item ID, and Category. Each field has a "Contains Any" dropdown and a text input field. The "Item ID" field is populated with "3204%38%". A "Search" button is located at the bottom of the pop-up window.

Click on the **Home** icon and then the **Express Item Entry** hyperlink.



Add Items and Services: Express Item Entry

If you know the **Item ID** number for the item or service you wish to order, enter it in the **Item ID** field and the rest of the information will automatically populate when you tab out of the field. Or, you may search for the **Item ID** using the magnifying glass icon.

To add an item or service to your shopping cart:

- Enter the **Item ID**.
- Enter the **Quantity** you wish to order.
- To add additional items using **Express Item Entry**, click the add new row (+) icon to the right of the first item.
- When all items and services have been entered, click on the **Add to Cart** button.
- If you want to add additional item(s) to the requisition using another method, e.g., **Special Requests**, click on the **Home** icon or use the left hand navigation.

The screenshot displays the Cardinal eProcurement system interface. The top navigation bar includes the Cardinal logo, a welcome message, and search options. The main navigation menu shows 'Favorites', 'Main Menu', 'eProcurement', and 'Requisition'. The 'Create Requisition' link is highlighted. The user is logged in as ARDMAN, HELEN. The 'Home' icon is highlighted. The 'Express Item Entry' link is highlighted. The 'Express Item Entry' sidebar menu is highlighted, showing options like 'Catalog', 'Purchasing Items', 'Express Item Entry', 'Special Requests', 'Forms', 'Business Cards', 'Favorites', 'Templates', 'ePro Services', and 'Recently Ordered'. The 'Add to Cart' button is highlighted. The table below shows the items added to the cart, with the 'Item ID' and 'Quantity' fields highlighted.

Line	Item ID	Description	Quantity	UOM	Category	Price	Merchandise Amount	
1	0051404000	ABRASIVES, PLASTONE	500.0000	EA	0051404	0.0100	5.00 USD	+
2	0051410000	ABRASIVES, SILICON CARBIDE (CARBORUNDUM) OXIDE	2000.0000	EA	0051410	0.0100	20.00 USD	+
3	3052860018	POINTERS AND PARTS, LEAD ABRASIVE REFILL CUPS, SUITABLE FOR SHARPENING GRAPHITE AND P	300	EA	3052860	0.0100	USD	+

Click on the **Add to Cart** button.



Add Items and Services: Express Item Entry (continued)

Once the items are added to the shopping cart using **Express Item Entry**, the **Express Item Entry** page is still displayed and the shopping cart **Lines** indicator is updated to reflect the total number of lines in the cart.

Any time the shopping cart icon is displayed you can hover over it, or click on it, to view the items in the cart. If you click on it, the cart contents will be displayed on the right hand side of the screen along with navigation to **Checkout**.

After all items have been added to your requisition, use the **Checkout** button to review the requisition contents, make final adjustments, modify accounting distributions, update shipping details, or add last-minute items. From the **Checkout – Review and Submit** page you will also submit your requisition for approval.

Click on one of the **Checkout** buttons.

The screenshot displays the CARDINAL eProcurement system interface. The top navigation bar includes the CARDINAL logo, a welcome message, and search options. The main menu is expanded to show 'eProcurement' and 'Requisition'. The 'Express Item Entry' button is highlighted in the left sidebar. The main content area shows a table for adding items to the cart, with columns for Item ID, Description, Quantity, and UOM. A table of items is displayed, including 'ABRASIVES, PLASTONE', 'ABRASIVES, SILICON CARBIDE', and 'POINTERS AND PARTS, LEAD'. The 'Add to Cart' button is visible. A 'Shopping Cart' overlay is shown on the right, displaying the items added to the cart, their quantities, and the total amount. The 'Checkout' button is highlighted in the overlay.

Description	Qty	UOM
ABRASIVES, PLASTONE	500	EA
ABRASIVES, SILICON CARBIDE	2000	EA
POINTERS AND PARTS, LEAD	300	EA
Total Lines	3	
Total Amount (USD)	28.00	



Checkout - Review and Submit

On the **Checkout – Review and Submit** page you can save the requisition and submit it for approval immediately or save for later. Additionally, you can edit or add requisition items and accounting distribution details, as well as modify shipping details or add comments and attachments. You can also enter a justification comment that is sent with the approval.

Checkout – Review and Submit Page Sections:

Requisition Summary: Confirm the information is accurate and update if needed.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences

Requisition Settings

Requisition Summary

Business Unit

50100

VA Dept of Transportation

Requisition Name

Requester

PPS1_HELEN.ARDMAN

ARDMAN, HELEN

Priority

Medium

*Currency

USD

Cart Summary: Total Amount 28.00 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ 1	ABRASIVES, PLASTONE ABRASIVES,	0051404000	E & M Auto Paint and Supply Corp	500.0000	Each	0.0100	5.00		Add	
▶ 2	ABRASIVES, SILICON CARBIDE (CA	0051410000	E & M Auto Paint and Supply Corp	2000.0000	Each	0.0100	20.00		Add	
▶ 3	POINTERS AND PARTS, LEAD ABRAS	3052860018	MBC PRECISION IMAGING	300.0000	Each	0.0100	3.00		Add	

☐ Select All / Deselect All

Select lines to:

Add to Favorites

Add to Template(s)

Delete Selected

Mass Change

Total Amount

28.00 USD

Shipping Summary

Edit for All Lines

Ship To Location

CNTRL OFF3

Address

VDOT Central Office

1221 E. Broad St.

Richmond, VA 23219

Attention To

ARDMAN, HELEN



Checkout - Review and Submit: Requisition Lines

Checkout – Review and Submit Page Sections (continued):

Requisition Lines: Displays information about each requisition line:

- **Add More Items:** Click on the button to add more items to your requisition. The **Create Requisition** page will open and you can search and select additional items to add to your shopping cart.
- **Line Details** icon: Click to access the **Line Details** pop-up window, where you can modify additional line details, such as the buyer, supplier, and other line-specific information.
- **Expand** triangle icon: Expand a row to view or change line shipping and accounting information, specific to the expanded line.
 - Confirm or update the **Ship To** location for each line. You can use the magnifying glass icon to search for a different shipping location.

Cart Summary: Total Amount 28.00 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	ABRASIVES, PLASTONE ABRASIVES,	0051404000	E & M Auto Paint and Supply Corp	500.0000	Each	0.0100	5.00			
Shipping Line 1										
		*Ship To	CNTRL OFF3	Quantity	500.0000					
		Address	VDOT Central Office 1221 E. Broad St. Richmond, VA 23219	Add One Time Address	Price	0.0100	Price Adjustment Pegging Inquiry Pegging Workbench			
		Attention To	ARDMAN, HELEN							
		Due Date								
Accounting Lines										
		*Distribute By	Qty	SpeedChart						
Accounting Lines										
Personalize Find View All First 1 of 1 Last										
Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2					
Line	Status	Dist Type	Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event		
1	Open		CNTRL OFF3	500.0000	100.0000	5.00	50100			
2										
3										
Select All / Deselect All										
Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change										
							Total Amount	28.00 USD		

Click on the **Expand** triangle icon for a line.



Checkout - Review and Submit: Requisition Lines (continued)

Cart Summary: Total Amount 28.00 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
<input checked="" type="checkbox"/> 1	ABRASIVES, PLASTONE ABRASIVES,	0051404000	E & M Auto Paint and Supply Corp	500.0000	Each	0.0100	5.00		Add	
Shipping Line 1										
		*Ship To	CNTRL OFF3	Quantity		500.0000				
		Address	VDOT Central Office 1221 E. Broad St. Richmond, VA 23219	Add One Time Address		Price	0.0100	Price Adjustment Pegging Inquiry Pegging Workbench		
		Attention To	ARDMAN, HELEN							
		Due Date								

Accounting Lines

*Distribute By CitySpeedChart

Accounting Lines

PersonalizeFindView AllFirst1 of 1Last

Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2			
Line	Status	Unit Type	Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		CNTRL OFF3	500.0000	100.0000	5.00	50100	

<input checked="" type="checkbox"/> 2	ABRASIVES, SILICON CARBIDE (CA)	0051410000	E & M Auto Paint and Supply Corp	2000.0000	Each	0.0100	20.00		Add	
<input checked="" type="checkbox"/> 3	POINTERS AND PARTS, LEAD ABRAS	3052860018	MBC PRECISION IMAGING	300.0000	Each	0.0100	3.00		Add	

☒ Select All / Deselect All

Select lines for:

Add to Favorites

Add to Template(s)

Delete Selected

Mass Change

Total Amount 28.00 USD



Checkout - Review and Submit: Requisition Lines (continued)

Requisition Lines continued:

- **Accounting Lines:** Click on the **Expand** triangle icon next to a line to view the accounting distribution details for the line.
 - You can add / delete accounting distribution lines using the **+** / **-** icons. If you have more than one line, be sure to indicate the percentage of the total requisition line that should go to each accounting distribution line on the **ChartFields 1** tab. The total must equal 100%.
 - On the **ChartFields 2** tab, enter or modify the ChartField distribution for each line.
 - You may use a SpeedChart.

Cart Summary: Total Amount 28.00 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line

Description

Item ID

Supplier

Quantity

UOM

Price

Total

Details

Comments

Delete

1

ABRASIVES, PLASTONE ABRASIVES,

0051404000

E & M Auto Paint and Supply Corp

500.0000

Each

0.0100

5.00

Shipping Line

1

*Ship To

CNTRL OFF3

Quantity

500.0000

Address

VDOT Central Office
1221 E. Broad St.
Richmond, VA 23219

Add One Time Address

Price

0.0100

Attention To

ARDMAN, HELEN

Due Date

Price Adjustment

Pegging Inquiry

Pegging Workbench

Accounting Lines

*Distribute By

Qty

SpeedChart

Accounting Lines

Chartfields1

Chartfields2

Details

Details 2

Asset Information

Asset Information 2

Personalize

Find

View All

First

1-2 of 2

Last

Line

Status

Dist Type

*Location

Quantity

Percent

Merchandise Amt

GL Unit

1

Open

CNTRL OFF3

375.0000

75.0000

3.75

50100

2

Open

CNTRL OFF3

125.0000

25.0000

1.25

50100

Accounting Lines

Chartfields1

Chartfields2

Details

Details 2

Asset Information

Asset Information 2

Account

Fund

Program

Department

Cost Center

Task

FIPS

Asset

Agency Use 1

Agency Use 2

PC Bus Unit

5012550

04100

699001

10003

111200

5012550

04100

699001

10004

111200



Checkout - Review and Submit: Requisition Lines (continued)

Requisition Lines continued:

- Accounting Lines:** Another option for updating all the accounting lines during checkout is to use the **Requisitions Settings** hyperlink at the top of the page. Select the **Override** radio button, enter your accounting distribution changes, and click on the **OK** button. A pop-up window will appear. Select a **Distribution Change Option** and click the **OK** button.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences

Requisition Settings

Requisition Summary

Requisition Settings

Business Unit

50100

VA Dept of Transportation

Requisition Name

Requester

PPS1_HELEN.ARDMAN

ARDMAN, HELEN

Priority

*Currency

USD

Default Options

☐ Default

If you select this option, the defaults specified below will be applied to requisition lines when there are no fields.

☒ Override

If you select this option, the defaults specified below will override any predefined values for these fields.

Accounting Defaults

Chartfields1

Details

Asset Information

Dist	Percent	Location	GL Unit	Entry Event	Account	Fund	Program
1	75.0000	CNTRL OFF3	50100		5012580	04000	
2	25.0000	CNTRL OFF3	50100		5012550	04100	

OK

Cancel

Distribution Change Options

For the selected requisition lines that are available for sourcing, apply distribution changes to

☒ All Distribution Lines

Apply changes to all existing distribution lines.

☐ Matching Distribution Lines

Apply changes to each existing distribution line by matching the distribution line numbers.

☐ Replace Distribution Lines

Remove the existing distribution lines and replace with the distribution lines changes.

OK

Cancel



Checkout - Review and Submit: Requisition Lines (continued)

Requisition Lines continued:

From the **Checkout** page, click on the **Line Details** icon to the right of the line you wish to update / review.

The **Line Details** pop-up window displays and you can view / modify requisition line details for the item you selected, to include:

- **Items Details**
- **Contract Information**
- **Supplier Information**
- **Manufacturer Information**
- **Sourcing Controls**

Click the **OK** button after your review and updates are complete. The **Checkout – Review and Submit** page will be active again.

The screenshot shows the 'Line Details' pop-up window with the following sections and fields:

- Line Details:** Line 1, ABRASIVES, PLASTONE ABRASIVES, Line Status: Open.
- Item Details:** Merchandise Amount: 5.00 USD, Item ID: 0051404000, Category: 0051404, Original Substituted Item Description, Physical Nature: Goods, Buyer: PPS1_HELEN.ARDMAN, Buyer Information, Configuration Info.
- Contract Information:** Use Contract if Available (checked), Contract ID, Contract Details, Version, Contract Line, Category Line.
- Supplier Information:** Supplier ID: 0000034153, Supplier Location: MAIN, Supplier Item ID, Supplier's Catalog.
- Manufacturer Information:** Manufacturer ID, Manufacturer, Manufacturer's Item ID, GTIN.
- Sourcing Controls:** Consolidate with other Reqs (unchecked), Calculate Price (checked), Override Suggested Supplier (checked).
- Buttons:** OK, Cancel.



- **Add to Favorites:**

- Place a checkmark on the item lines you will purchase on a regular basis and wish to appear in your **Favorites** list for quick and easy reorders. You can also place a checkmark in the **Select All / Deselect All** checkbox to select / deselect all the lines.
- Click on the **Add to Favorites** hyperlink. A pop-up window will appear to confirm the addition(s) to your list of favorites.
- Click the **OK** button to confirm.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences

Regulation Settings

Regulation Summary

Business Unit

50100

VA Dept of Transportation

Requestion Name

Requester

PPS1_HELEN,ARDMAN

ARDMAN, HELEN

Priority

Medium

*Currency

USD

Cart Summary: Total Amount 28.00 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete																																												
<input checked="" type="checkbox"/>	ABRASIVES, PLASTONE ABRASIVES	0051404000	E & M Auto Paint and Supply Corp	500.0000	Each	0.0100	5.00		Add																																													
<div> <div>Shipping Line 1</div> <div> <div>*Ship To</div> <div>CNTRL OFFS</div> <div>Quantity</div> <div>500.0000</div> </div> <div> <div>Address</div> <div>VOOT Central Office 1221 E. Broad St Richmond, VA 23219</div> <div>Add One Time Address</div> <div>Price</div> <div>0.0100</div> </div> <div> <div>Attention To</div> <div>ARDMAN, HELEN</div> <div>Price Adjustment</div> <div>Pegging Inquiry</div> <div>Pegging Workbench</div> </div> <div> <div>Due Date</div> <div></div> </div> </div>																																																						
<div> <div>Accounting Lines</div> <div>*Distribute By</div> <div>Qty</div> <div>SpeedChart</div> <div>11120010</div> </div> <table> <thead> <tr> <th colspan="11">Accounting Lines</th> </tr> <tr> <th>Chartfield1</th> <th>Chartfield2</th> <th>Details</th> <th>Details 2</th> <th>Asset Information</th> <th>Asset Information 2</th> <th></th> <th></th> <th></th> <th></th> <th></th> </tr> <tr> <th>Account</th> <th>Fund</th> <th>Program</th> <th>Department</th> <th>Cost Center</th> <th>Task</th> <th>FIPB</th> <th>Asset</th> <th>Agency Use 1</th> <th>Agency Use 2</th> <th>PC Bus Unit</th> </tr> </thead> <tbody> <tr> <td>5022630</td> <td>Q4100</td> <td>Q699001</td> <td>Q10050</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>											Accounting Lines											Chartfield1	Chartfield2	Details	Details 2	Asset Information	Asset Information 2						Account	Fund	Program	Department	Cost Center	Task	FIPB	Asset	Agency Use 1	Agency Use 2	PC Bus Unit	5022630	Q4100	Q699001	Q10050							
Accounting Lines																																																						
Chartfield1	Chartfield2	Details	Details 2	Asset Information	Asset Information 2																																																	
Account	Fund	Program	Department	Cost Center	Task	FIPB	Asset	Agency Use 1	Agency Use 2	PC Bus Unit																																												
5022630	Q4100	Q699001	Q10050																																																			
<input checked="" type="checkbox"/>	ABRASIVES, SILICON CARBIDE (CA	0051410000	E & M Auto Paint and Supply Corp	2000.0000	Each	0.0100	20.00		Add																																													
<input checked="" type="checkbox"/>	POINTERS AND PARTS, LEAD ABRAS	3052860018	MBC PRECISION IMAGING	300.0000	Each	0.0100	3.00		Add																																													

Select All / Deselect All

Select lines to:

Add to Favorites

Add to Template(s)

Delete Selected

Mass Change

Cart Summary: Total Amount 28.00 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total
▶ <input checked="" type="checkbox"/> 1	ABRASIVES, PLASTONE ABRASIVES,	0051404000	E & I Supp				
▶ <input checked="" type="checkbox"/> 2	ABRASIVES, SILICON CARBIDE (CA	0051410000	E & I Supp				
▶ <input checked="" type="checkbox"/> 3	POINTERS AND PARTS, LEAD ABRAS	3052860018	MBC IMAG				
<input checked="" type="checkbox"/> Select All / <input type="checkbox"/> Deselect All		Select lines to:	<div> <div></div> <div>Add</div> </div>				

+

Add More Items

Confirmation

The following item(s) will be added to your favorites:

ABRASIVES, PLASTONE ABRASIVES, PLASTONE ABRASIVES, SILICON CARBIDE (CARBORUNDUM) OXIDE ABRASIVES, SILICON CARBIDE (CARBORUNDUM) OXIDE
 POINTERS AND PARTS, LEAD ABRASIVE REFILL CUPS, SUITABLE FOR SHARPENING GRAPHITE AND P

☐ Do not show this message again

OK

Cancel



Checkout - Review and Submit (continued)

Checkout – Review and Submit Page Sections (continued):

- **Shipping Summary:** Click the **Edit for All Lines** hyperlink to modify the shipping details or accounting lines for the entire requisition.
- **Requisition Comments:** Enter comments and select the appropriate checkbox that determines who will see your comments.
- **Approval Justification:** Enter comments that you wish to be viewed by requisition approvers and reviewers during the approval process.
- If you choose **Save for Later**, the **Requisition Name** and **Requisition ID** are automatically populated upon save.
- Click the **Save & submit** button to submit the requisition for approval, budget checking, and fulfillment. The **Requisition Name** and **Requisition ID** are automatically populated upon save.

Checkout - Review and Submit
Review the item information and submit the req for approval.

Requisition Summary

Business Unit	50100	VA Dept of Transportation
Requester	PPS1_HELEN.ARDMAN	ARDMAN, HELEN
*Currency	USD	
Requisition Name		
Priority	Medium	

Cart Summary: Total Amount 28.00 USD

Shipping Summary

[Edit for All Lines](#)

Ship To Location: CNTRL OFF3
Address: VDOT Central Office
1221 E. Broad St.
Richmond, VA 23219
Attention To: ARDMAN, HELEN

Requisition Comments

Enter requisition comments

☐ Send to Supplier ☐ Show at Receipt ☐ Shown at Voucher

Approval Justification

Enter approval justification for this requisition

Buttons: Save & submit, Save for Later, Add More Items, 60 Preview Approvals

Checkout - Review and Submit
Review the item information and submit the req for approval.

Requisition Summary

Business Unit	50100	VA Dept of Transportation
Requester	PPS1_HELEN.ARDMAN	ARDMAN, HELEN
*Currency	USD	
Requisition Name	0002175952	
Requisition ID	0002175952	
Priority	Medium	



Checkout: Confirmation

Once the **Save and submit** has processed, a **Confirmation** page appears that displays details about your requisition and its current disposition, to include:

- **Requisition Name:** Defaults to the Requisition ID number if the field was not completed during the creation of the requisition.
- **Requisition ID** number: Auto generated sequential number.

Use the **Edit This Requisition** hyperlink to modify the requisition.

Workflow approval routing is also displayed. Click on the **Multiple Approvers** hyperlink to view additional routing details.

Use the **Manage Requisitions** hyperlink to access other pages to perform tasks, such as review requisition details, edit or cancel requisitions, create change requests, copy requisition, view approvals, or return stock to the supplier.

The screenshot shows the CARDINAL Confirmation page. At the top, there's a navigation bar with 'Main Menu', 'eProcurement', and 'Requisition' highlighted. Below this, a 'Confirmation' tab is selected. The main content area displays the message 'Your requisition has been submitted.' followed by details: 'Requested For ARDMAN, HELEN', 'Requisition Name 0002175952', 'Requisition ID 0002175952', 'Business Unit 50100', 'Status Pending', and 'Priority Medium'. To the right, it shows 'Number of Lines 3' and 'Total Amount 28.00 USD'. Below these details are links for 'View printable version' and 'Edit This Requisition'. A red box highlights the 'Edit This Requisition' link. Below the main content, there's a section titled 'Req for Supervisor Action' showing a 'Pending' status for 'MCCRACKEN, STACY' as the 'Requester's Supervisor'. Another red box highlights the 'Req for Procurement Mgr Action' section, which shows 'Awaiting Further Approvals' and a 'Not Routed' status. Within this section, a red box highlights the 'Multiple Approvers' link. At the bottom, there are buttons for 'Apply Approval Changes', 'Create New Requisition', and 'Manage Requisitions', with the latter also highlighted by a red box.



Add Catalog Items

To search for and add items that are included in the catalog to your requisition, click on the **Catalog** or **Purchasing Items** hyperlink.

Click on the **Catalog** hyperlink.

The screenshot shows the Cardinal eProcurement system interface. At the top, there is a header with the Cardinal logo, a welcome message, and a search bar. Below the header, there is a navigation bar with links to Favorites, Main Menu, eProcurement, and Requisition. The 'Create Requisition' button is highlighted with a red box. Below the navigation bar, there is a section for 'Request Options' with a search bar and a 'Search' button. The 'Catalog' link is highlighted with a red box. The 'Catalog' link is also highlighted with a red box in the left sidebar. The 'Catalog' link is also highlighted with a red box in the main content area. The 'Catalog' link is also highlighted with a red box in the main content area.

Cardinal Welcome to Cardinal! All Search Advanced Search

Favorites Main Menu eProcurement Requisition

Create Requisition ?

Welcome ARDMAN, HELEN Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced Search

Catalog
Browse Catalogs
Purchasing Items

Express Item Entry
Create an Express Requisition

Special Requests
Create a non-catalog request

Forms
Create and Submit Forms
Business Cards

Favorites
Browse Favorite Items and Services

Templates
Browse Company and Personal Templates

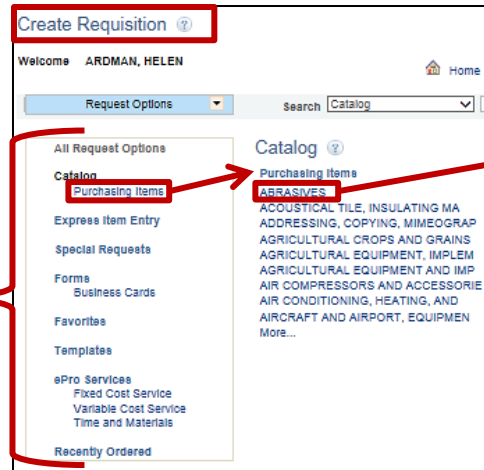
ePro Services
Request Services
Fixed Cost Service
Variable Cost Service
Time and Materials

Recently Ordered
View recently ordered items and services



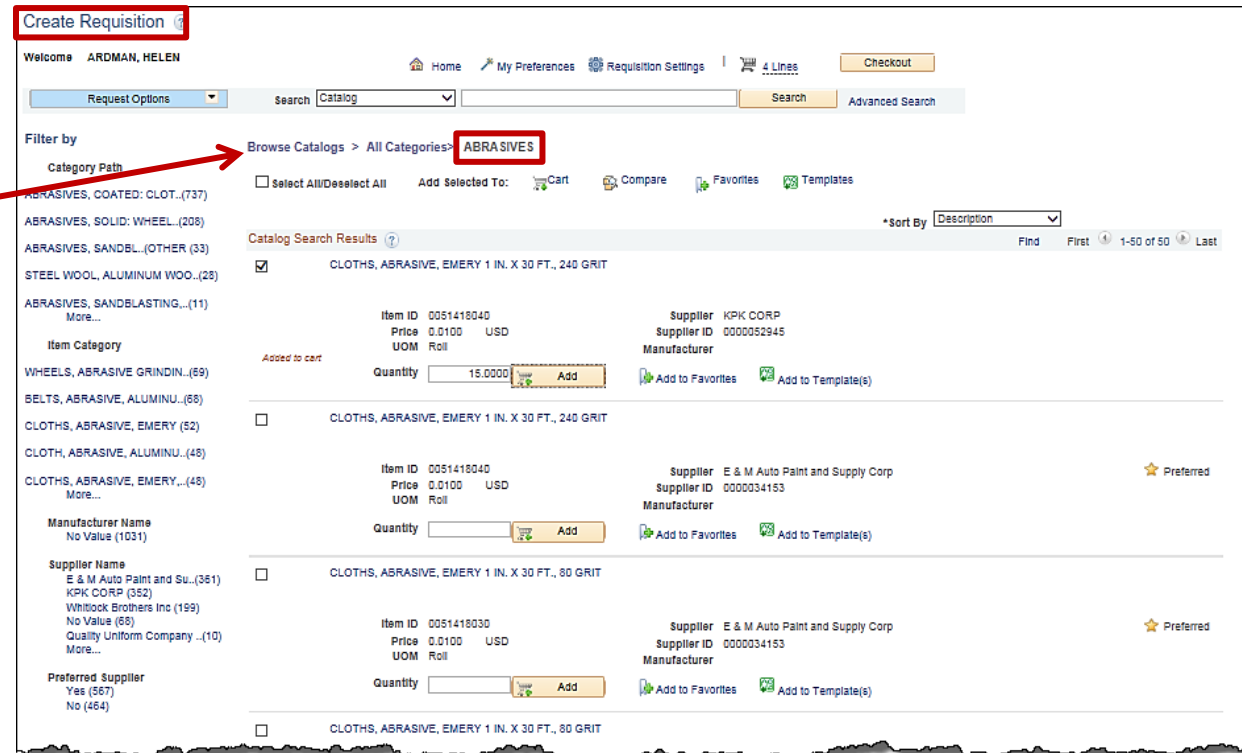
Add Catalog Items (continued)

You can filter your search results of the items available using the left side navigation menu. Click on a category to view all the items in the selected category.



Once you find an item you wish to order:

- Click on the box to the left of the item description to select the item.
- Update the **Quantity** field with the number of items you wish to order.
- Click on the **Add** button to add the item(s) to your shopping cart.
- Click on the **Checkout** button to continue to process your requisition as shown on the previous pages.





Add Catalog Items (continued)

Create Requisition ?

Welcome ARDMAN, HELEN

Home My Preferences Requisition Settings 4 Lines Checkout

Request Options Search Catalog Search Advanced Search

Filter by

Category Path

ABRASIVES, COATED: CLOT...(737)

ABRASIVES, SOLID: WHEEL...(208)

ABRASIVES, SANDBL...(OTHER (33)

STEEL WOOL, ALUMINUM WOO...(28)

ABRASIVES, SANDBLASTING...(11)
More...

Item Category

WHEELS, ABRASIVE GRINDIN...(69)

Browse Catalogs > All Categories> ABRASIVES

☐ Select All/Deselect All Add Selected To: Cart Compare Favorites Templates

Catalog Search Results ?

☒ CLOTHS, ABRASIVE, EMERY 1 IN. X 30 FT., 240 GRIT

Item ID 0051418040

Price 0.0100 USD

UOM Roll

Quantity 15.0000 Add

Supplier KPK CORP

Supplier ID 0000052945

Manufacturer

Add to Favorites Add to Template(s)

☐ CLOTHS, ABRASIVE, EMERY 1 IN. X 30 FT., 240 GRIT

Item ID 0051418040

Price 0.0100 USD

UOM Roll

Quantity Add

Supplier E & M Auto Paint and Supply Corp

Supplier ID 0000034153

Manufacturer

Add to Favorites Add to Template(s)

☐ CLOTHS, ABRASIVE, EMERY 1 IN. X 30 FT., 80 GRIT

Item ID 0051418030

Price 0.0100 USD

UOM Roll

Quantity Add

Supplier E & M Auto Paint and Supply Corp

Supplier ID 0000034153

Manufacturer

Add to Favorites Add to Template(s)

☐ CLOTHS, ABRASIVE, EMERY 1 IN. X 30 FT., 80 GRIT

*Sort By Description

Find First 1-50 of 50 Last

Create Requisition ?

Welcome ARDMAN, HELEN

Home

Request Options Search Catalog

All Request Options

Catalog

Purchasing Items

Express Item Entry

Special Requests

Forms

Business Cards

Favorites

Templates

ePro Services

Fixed Cost Service

Variable Cost Service

Time and Materials

Recently Ordered

Catalog ?

Purchasing Item

ABRASIVES

ACOUSTICAL TILE, INSULATING MA

ADDRESSING, COPYING, MIMEOGRA

AGRICULTURAL CROPS AND GRAINS

AGRICULTURAL EQUIPMENT, IMPLE

AGRICULTURAL EQUIPMENT AND IMP

AIR COMPRESSORS AND ACCESSORIE

AIR CONDITIONING, HEATING, AND

AIRCRAFT AND AIRPORT, EQUIPMEN

More...



Add Special Requests

To add items or goods to your requisition that are not included in the catalog of items and have no item ID, use the **Special Requests** page. A special request can be for goods or services.

Click on the **Special Requests** hyperlink.

The screenshot displays the CARDINAL eProcurement system interface. At the top, the CARDINAL logo is visible on the left, and the text "Welcome to Cardinal!" is in the center. To the right of the welcome message is a search bar with a dropdown menu set to "All" and a "Search" button. Further right is a link to "Advanced Search". Below the header, a navigation bar shows a breadcrumb trail: "Main Menu > eProcurement > Requisition". The "Create Requisition" link is highlighted with a red box. Below this, the user's name "ARDMAN, HELEN" is displayed. To the right of the name are links for "Home", "My Preferences", "Requisition Settings", and a shopping cart icon showing "0 Lines". A "Checkout" button is also present. Below the navigation bar, there is a "Request Options" dropdown menu and a search bar with a dropdown set to "All". The main content area is divided into two columns. The left column contains a list of "All Request Options" including "Catalog", "Express Item Entry", "Special Requests", "Forms", "Favorites", "Templates", "ePro Services", and "Recently Ordered". The right column contains a grid of links: "Catalog" (Browse Catalogs, Purchasing Items), "Express Item Entry" (Create an Express Requisition), "Special Requests" (Create a non-catalog request), "Forms" (Create and Submit Forms, Business Cards), "Favorites" (Browse Favorite Items and Services), "Templates" (Browse Company and Personal Templates), "ePro Services" (Request Services, Fixed Cost Service, Variable Cost Service, Time and Materials), and "Recently Ordered" (View recently ordered items and services). The "Special Requests" link is highlighted with a red box.



Add Special Requests (continued)

On the **Special Requests** page, complete the following sections, if applicable:

- **Item Details:** Add an item not in the catalog. An * indicates a required field.
- **Supplier:** If you have a preferred supplier, enter the information here.
- **Manufacturer:** If you have a preferred manufacturer enter the information here.
- **Additional Information:** Add comments you wish for the buyer to see.

Request New Item: Select this check box to request that the item be added to the item master. A request new item worklist notification is sent.

Add to Cart: Click this button to add the special item you entered to the requisition.

Continue to process your requisition as shown on the previous pages.

The screenshot shows the 'Create Requisition' page in the CARDINAL system. The 'Special Requests' section is highlighted with a red box. It includes the following fields and options:

- Item Details:**
 - *Item Description (text field)
 - *Price (text field)
 - *Quantity (text field)
 - *Category (text field with search icon)
 - *Currency (dropdown menu, currently set to USD)
 - *Unit of Measure (text field with search icon)
 - Due Date (text field with calendar icon)
- Supplier:**
 - Supplier ID (text field with search icon)
 - Supplier Name (text field with search icon)
 - Supplier Item ID (text field)
 - Suggest New Supplier (link)
- Manufacturer:**
 - Mfg ID (text field with search icon)
 - Manufacturer (text field)
 - Mfg Item ID (text field)
- Additional Information:**
 - Text area for comments
 - Send to Supplier (checkbox)
 - Show at Receipt (checkbox)
 - Show at Voucher (checkbox)
- Request New Item:**
 - Request New Item (checkbox) - A notification will be sent to a buyer regarding this new item request.
- Add to Cart** (button)



Add eProcurement Services

From the **Create Requisition** page, click on one of the **ePro Services** hyperlinks:

- **Fixed Cost Service:** This is a service with a fixed fee and is not part of the item catalog.
- **Variable Cost Service:** This is a service that is based on the number of hours of work.
- **Time and Materials:** Used to request a service that is based on time worked and materials used.

The screenshot shows the Cardinal eProcurement system interface. The breadcrumb trail "Main Menu > eProcurement > Requisition" is highlighted with a red box. The "Create Requisition" link is also highlighted with a red box. At the bottom, the "ePro Services" section is highlighted with a red box, showing links for "Fixed Cost Service", "Variable Cost Service", and "Time and Materials".



Enter the details and click on the **Add to Cart** button.

Continue to process your requisition as shown on the previous pages.

Item Description		<input type="text"/>	
*Quantity	<input type="text"/>	*Unit of Measure	<input type="text"/>
*Price	<input type="text"/>	*Currency	USD
*Category	<input type="text"/>		
Supplier ID	<input type="text"/>		
Supplier Name	<input type="text"/>		Suggest New Supplier
Supplier Item ID	<input type="text"/>		
Manufacturer ID	<input type="text"/>		
Manufacturer			
Mfg Item ID	<input type="text"/>		
Start Date	<input type="text"/>	End Date	<input type="text"/>



Simulation: Creating a Requisition from eProcurement

You are now about to view a simulation that demonstrates how to create a requisition using eProcurement. Click the Cardinal logo below to start the simulation.





Create a Personal Template

You can create a personal eProcurement requisition template using data from an existing requisition. This allows you to create new requisitions in eProcurement that are pre-populated with the data you save on the template, thus eliminating some data entry. Once a requisition is created from the template, you can modify it.

To create an eProcurement requisition template, navigate to the **Manage Requisitions** page using the following path:

Main Menu > eProcurement > Manage Requisitions

- **Business Unit** defaults.
- If you know the **Requisition ID** you want to use to create your template from, you may enter it.
- Set the **Request Status** to **All but Complete**.
- Click on the **Search** button.
- Select a requisition from the search results.
- On the **Select Action** drop-down next to the selected requisition, select **Edit**.
- Click on the **Go** button. The **Edit Requisition – Review and Submit** page will display.

WELCOME TO CARDINAL!

Search [] Advanced Search

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit [50100] Requisition Name []

Requisition ID [] Request State [All but Complete]

Date From [08/01/2016] Date To [12/29/2016]

Requester [] Entered By [] PO ID []

Search Clear Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Total
0002175952	0002175952	50100	12/29/2016	Pending	28.00 USD
0002175951	Helen Express ePro	50100	11/17/2016	Pending	0.01 USD
0002175950	0002175950	50100	11/17/2016	Open	50.00 USD
0002175949	0002175949	50100	10/21/2016	Open	148.75 USD
0002175948	0002175948	50100	10/21/2016	Open	1.00 USD
0002175827	0002175827	50100	10/08/2016	Approved	1,800.98 USD
01PR02018	01PR02018	50100	10/08/2016	Open	938.30 USD
0002175947	0002175947	50100	10/08/2016	Open	938.30 USD
0002175817	FOB PLANT MIX - W-L NORTON	50100	10/05/2016	Pending	670,399.00 USD
0002175946	Smoke Test	50100	10/03/2016	Open	0.01 USD
0002175945	12x7x72 Box Culvert	50100	08/08/2016	Pending	98,000.00 USD



Create a Personal Template (continued)

CARDINAL Welcome to Cardinal! All Search Advanced Search

Favorites Main Menu eProcurement Manage Requisitions Requisition

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: 50100 VA Dept of Transportation Requisition Name: 0002175827
Requester: DEBBIE.BELL Bell, Debbie (VDOT) Requisition ID: 0002175827
Currency: USD Priority: Medium

Cart Summary: Total Amount 1,800.96 USD

Expand lines to review shipping and accounting details

Requisition Lines

	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
<input checked="" type="checkbox"/>	1 POSTS, SIGN, TELES PAR (QWIK) A	8013051628	Korman Signs Inc	1.0000	Each	67.5200	67.52		Add	
<input checked="" type="checkbox"/>	2 POSTS, SIGN, STEEL, MISCELLANE	8013053046	Korman Signs Inc	4.0000	Each	58.0600	232.24		Add	
<input checked="" type="checkbox"/>	3 PARTS AND ACCESSORIES, SIGN PO	8013059727	Korman Signs Inc	5.0000	Each	108.9000	544.50		Add	
<input checked="" type="checkbox"/>	4 POSTS, SIGN, STEEL 2 IN. X 2 I	8013055099	Korman Signs Inc	18.0000	Each	19.8000	356.40		Add	
<input type="checkbox"/>	5 POSTS, SIGN, TELES PAR (QWIK) A	8013051624	Korman Signs Inc	18.0000	Each	33.3500	600.30		Add	

☐ Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 1,800.96 USD

Shipping Summary

Edit for All Lines

Ship To Location: TAPPAH FM2
Address: VDOT Tappahannock Pavement Marking
1213 Tappahannock Blvd.
Intersection of Rt 17 and Rt 360
Tappahannock, VA 22560
Attention To: Bell, Debbie (VDOT)

Requisition Comments

Enter requisition comments

☐ Send to Supplier ☐ Show at Receipt ☐ Shown at Voucher

Approval Justification

Enter approval justification for this requisition

Save & submit Save for Later Add More Items Preview Approvals

Your template may contain one or more lines. To create your template, from the **Edit Requisition – Review and Submit** page, **Requisition Lines** section:

- Click the checkbox next to the line(s) you want to include on your template. You can also place a checkmark in the **Select All / Deselect All** checkbox to select / deselect all the lines.
- Click on the **Add to Template(s)** button. A pop-up window displays.
- Enter a name and description for your template. Click the **OK** button to save the new template.
- The **Check Out – Review and Submit** page is displayed. You may process this as a new requisition or navigate away from the page.

CARDINAL Welcome to Cardinal! All Search Advanced Search

Favorites Main Menu eProcurement Manage Requisitions Requisition

Edit Requisition - Review and Submit

Review the item information

Requisition Summary

Add items to Templates

Add Selected Items to Template(s)

Templates

Template Name	Description	Personalize	Find	View All	First	1 of 1	Last
<input type="checkbox"/> Test	Test Template						

Add a new template

Template Name: Abrasives
Description: Abrasives Reorder

OK Cancel



Use a Personal Template

Your template is now saved. When you create a new requisition, you can select this template from the eProcurement **Create Requisitions** page. Click on the named template's hyperlink under the **Templates** section.

Favorites ▾Main Menu ▾ > eProcurement ▾ > Requisition

Create Requisition ?

Welcome ARDMAN, HELEN

[Home](#) [My Preferences](#) [Requisition Settings](#) | [0 Lines](#) [Checkout](#)

Request Options ▾

Search All

Search

Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.

Catalog

Browse Catalogs

Purchasing Items

Forms

Create and Submit Forms

Business Cards

ePro Services

Request Services

Fixed Cost Service

Variable Cost Service

Time and Materials

Express Item Entry

Create an Express Requisition

Favorites

Browse Favorite Items and Services

NUTS, JAM, STEEL 1-1/4 IN. S...

ABRASIVES, PLASTONE ABRASIVE...

ABRASIVES, SILICON CARBIDE (...

POINTERS AND PARTS, LEAD ABR...

Templates

Browse Company and Personal Templates

Abrasives Reorder

Test Template

72



Use a Personal Template (continued)

All your personal templates will display.

- If you wish to view the items in the template, click on the **Expand** triangle icon.
- For each template you wish to add to your requisition, enter the quantity in the box to the right of the template name.
- Click on the **Add** button to add all the items in the template to your requisition. The words **Added to cart** will appear to the right of the **Add** button.
- Click on the **Checkout** button to continue processing your requisition as described on the previous pages.

Manage Personal Templates: This hyperlink will initiate a pop-up window where you can view template details and modify details if needed.

Create Requisition ?

Welcome ARDMAN, HELEN

Home My Preferences Requisition Settings 3 Lines Checkout

Request Options Search Templates Search Advanced Search

All Request OptionsCatalogPurchasing ItemsExpress Item EntrySpecial RequestsFormsBusiness CardsFavoritesTemplatesePro ServicesFixed Cost ServiceVariable Cost ServiceTime and MaterialsRecently Ordered

Templates ?

Abrasives Reorder1.0000AddAdded to cart

Personal Template ItemsFindFirst1-3 of 3

ABRASIVES, PLASTONE ABRASIVES, PLASTONE

Price BreaksItem ID 0051404000Supplier Name E & M Auto Paint and Supply CorpPrice 0.0100 USDSupplier ID 0000034153UOM EachManufacturerQuantity 500.0000

ABRASIVES, SILICON CARBIDE (CARBORUNDUM) OXIDE ABRASIVES, SILICON CARBIDE (CARBORUNDUM) OXIDEItem ID 0051410000Supplier Name E & M Auto Paint and Supply CorpPrice 0.0100 USDSupplier ID 0000034153UOM EachManufacturerQuantity 2000.0000

POINTERS AND PARTS, LEAD ABRASIVE REFILL CUPS, SUITABLE FOR SHARPENING GRAPHITE AND PItem ID 3052860018Supplier Name MBC PRECISION IMAGINGPrice 0.0100 USDSupplier ID 0000052871UOM EachManufacturerQuantity 300.0000

Test TemplateAdd

Manage Personal Templates

Which feature allows you to add to requisition items that are not tied to a catalog?

- ☐ eProcurement
- ☐ Special Requests
- ☐ ePro Services
- ☐ Express Entry

The Catalog search allows you to further narrow your search results using the left hand navigation.

- ☐ True
- ☒ False

Which method would be best to use when you buy the same group of items frequently?

- ☐ Recently Ordered
- ☐ Templates
- ☐ Express Item Entry
- ☐ A and B
- ☐ B
- ☐ A



Lesson 3: Summary

In this lesson, you learned how to:

- Create an eProcurement requisition
- Create and use eProcurement personal templates



Lesson 4: Maintaining a Requisition

This lesson covers the following topics:

- Maintaining a Requisition in the Purchasing Module
- Maintaining a Requisition in the eProcurement Module

Requisitions can be maintained in either the Purchasing or eProcurement module, regardless of which module was used to create the requisition. In both modules you can access, update, review, check the status of, or view documents associated to a requisition.

The options available in the Purchasing and eProcurement modules when maintaining a requisition are generally the same. However, they use different menus and views, and are presented differently on the screen.

You can edit or cancel a requisition as long as it has not already been sourced to a purchase order or a sourcing event.

You can make changes even if the requisition has been approved. However, increasing the price or quantity may trigger the requisition approval workflow.



Maintaining a Requisition: Purchasing Module

Purchasing Module

There are two pages from which you can view a requisition in the Purchasing module:

- **Maintain Requisitions** page
- **Requisitions** page (view only)

Maintain Requisitions Page

From this page, you can access, edit, cancel, and change a requisition.

Navigate using the following path:

Main Menu > Purchasing > Requisitions > Add / Update Requisitions

Use the **Find an Existing Value** tab search for the requisition you would like to maintain. Click on the desired requisition hyperlink.

Some of the viewable features include the **Document Status** and **View Approvals**.

Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value Add a New Value

Search Criteria

Business Unit = 50100 x

Requisition ID begins with

Requisition Name begins with

Requisition Status =

Origin begins with

Requester begins with

Requester Name begins with

☐ Hold From Further Processing

☐ Case Sensitive

Limit the number of results to (up to 300): 300

Search Clear

Basic Search Save Search Criteria

Search Results

300 of 15535 results are displayed.

[View All](#)

Business Unit	Requisition ID	Requisition Name	Requisition Status	Origin	Requester	Requester Name
50100	2075865	075865	Denied	ONL	SHARON.MORALES	Morales, Sharon W. (VDOT)
50100	2069457	RFR - S&I Removal Commuter Lot	Open	ONL	HEIDI.KOVACS	Kovacs, Heidi M. (VDOT)
50100	01PR0201B	01PR0201B	Open	ONL	A.HILL	Hill, A Scott (VDOT)
50100	002075373	002075373	Open	ONL	LINDA.BOWERY	Bowery, Linda (VDOT)



Maintaining a Requisition: Purchasing Module (continued)

Maintain Requisitions Page continued

Some of the viewable features include the **Document Status** and **View Approvals**. Click on the hyperlinks to view more details.

Maintain Requisitions

Requisition

Business Unit 50100

*WebIMS Req Type Regular

Status Pending

Requisition ID 0002175955

Requisition Name 0002175955

Hold From Further Processing

Header

*Requester GEORGE.MASON

MASON,GEORGE

*Requisition Date 01/15/2017

Requester Info

Origin ONL

Online Input

*Currency Code USD

Dollar

Requisition Defaults

Add Comments

Requisition Activities

Document Status

Amount Summary

Total Amount 15.00 USD

Select Lines To Display

Add Items From

Purchasing Kit

Catalog

Item Search

Requester Items

Search for Lines

Line

To

Retrieve

Line

Details

Ship To/Due Date

Status

Supplier Information

Item Information

Attributes

Contract

Sourcing Controls

WebIMS

Personalize

Find

View All

First

1 of 1

Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1	0051417548	CLOTHS, ABRASIVE,	1.0000	EA	0051417	15.00000	15.00	Pending					

View Approvals

*Go to ...More...

Save

Return to Search

Notify

Refresh

Add

Update/Display



Maintaining a Requisition: Purchasing Module (continued)

Requisitions Page

A requisition that does not need modifications could be viewed using the **Review Requisition Information** page. This is a view only page. Navigate to this page using the following path:

Main Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions

On the **Requisition Inquiry** page, enter your search criteria and click **OK**.

Requisition Inquiry

Business Unit	50100		
Requisition ID	0002175955	x	
Requisition Name			
Req Status			
Requester			
Requester Name			
Requisition Date			
Supplier SetID	STATE	Supplier Lookup	
Supplier ID		Supplier Details	
Item SetID	STATE		
Item Description			
Department			
254 characters remaining			
		<input type="checkbox"/> Direct Ship	
OK		Cancel	



Maintaining a Requisition: Purchasing Module (continued)

Requisitions Page continued

The **Details** tab displays the **Requisition ID**, **Requisition Name**, **Requisition Status**, **Requester**, **Req Date**, and **Total Amt**.

Click on the **Requisition** hyperlink to view **Requisition Details** for the requisition. Click **Return** to go back to the **Requisitions** page.

Requisitions

Req Inquiry

Personalize | Find | View All | [Print] [Export]

First 1 of 1 Last

Details

Status

Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt
50100	0002175955	0002175955	Pending Approval	MASON,GEORGE	01/15/2017	15.00 USD

Requisition Details

Business Unit 50100

Requester MASON,GEORGE

Requisition Date 01/15/2017

Req Status Pending

Merchandise Amount 15.00 USD

Req ID 0002175955

Requisition Details

Personalize | Find | View All | [Print] [Export]

First 1 of 1 Last

Details

More

Contract

Line	Status	Item ID	Description	Supplier ID	Supplier	Req Qty	UOM	Merchandise Amt	Amount Only
1	Pending	0051417548	CLOTHS, ABRASIVE, EMERY, 9 IN	0000034153	E & M Auto Paint and Supply Corp	1.0000	Each	15.00 USD	<input checked="" type="checkbox"/>

Return




Maintaining a Requisition: Purchasing Module (continued)

From the **Requisitions** page, click the **Status** tab to display the current or completed path of the requisition you are viewing. This tab contains hyperlinks to associated POs, Receipts, and Vouchers, as well as icon hyperlinks to the **Document Status**, **Approval Status**, and **Comments**.

In this example, clicking on the hyperlink for **On PO** will take you to the **Requisition to Purchase Order List** which will have additional hyperlinks to the POs. Clicking on the hyperlink for **Received** will take you to the **Requisition Receipts List** which will have additional hyperlinks to the receipts.

In the example below, the requisition went to PO and has been received, but not yet vouchered.



All

Search

>>

Advanced Search

Last Search Results

Favorites

Main Menu

Purchasing

Requisitions

Review Requisition Information

Requisitions

Requisitions

Req Inquiry

Personalize

Find

View All

1 of 1

Last

Details

Status

Unit	Requisition	Requisition Name	Change Order	On RFQ	On PO	Direct Ship from Supplier	Received	On MSR	On Voucher	Use Procurement Card			
50100	0002175955	0002175955											

Search

Notify



Maintaining a Requisition: eProcurement Module

You can also manage a requisition using the eProcurement module from the **Manage Requisitions** page. From this page, you can cancel, copy, edit, pre-check, and view a printable version of the requisition.

Navigate to the **Manage Requisitions** page using the following path:

Main Menu > eProcurement > Manage Requisitions

Search for the requisition you wish to maintain.

To view more details about a requisition click on the **Expand** triangle icon to the left of the **Req Id**.

To cancel, copy, edit, or view a requisition, select an action from the **Select Action** drop-down list and click **Go**.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 50100 Requisition Name: Request State: All but Complete Date From: 08/01/2016 Date To: 08/15/2016 Requirer: Entered By: PO ID:

Search **Clear** Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Total	
0002175945	12x7x72 Box Culvert	50100	08/08/2016	Pending	96,000.00 USD	[Select Action] Go
0002175944	12x8x42 Box Culvert	50100	08/08/2016	Canceled	0.00 USD	[Select Action] Go
0002175940	0002175940	50100	08/08/2016	Pending	4,202.24 USD	[Select Action] Go

Requester: Grindstaff, Bonnie (VDOT) Entered By: Grindstaff, Bonnie (VDOT) Priority: Medium

Request Lifespan:

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

Line Information

Line	Description	Status	Price	Quantity	UOM	Supplier	
1	COLD MIX, ASPHALT	Pending Approval	5.36000	784.0000	BG	Seaboard Asphalt Products Co	X
0002175937	RESTOCK 21A FOR ARLINGTON	50100	08/08/2016	PO(s) Dispatched	1,826.48 USD	[Select Action] Go	
0002175934	0002175934	50100	08/08/2016	Pending	1,800.00 USD	[Select Action] Go	
0002175913	0002175913	50100	08/08/2016	PO(s) Dispatched	7,500.60 USD	[Select Action] Go	
0002175905	SNOW 2016	50100	08/08/2016	Pending	8.00 USD	[Select Action] Go	
0002175902	0002175902	50100	08/08/2016	Pending	14,169.90 USD	[Select Action] Go	



Maintaining a Requisition: eProcurement Module (continued)

Favorites

Main Menu > eProcurement > Manage Requisitions

New Window | Help | Personalize Page

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit50100

Requisition Name

Requisition ID

Request StateAll but Complete

Date From08/01/2016

Date To08/15/2016

Requester

Entered By

PO ID

Search

Clear

Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Total	
0002175945	12x7x72 Box Culvert	50100	08/08/2016	Pending	96,000.00 USD	[Select Action] Go
0002175944	12x8x42 Box Culvert	50100	08/08/2016	Canceled	0.00 USD	[Select Action] Go
0002175940	0002175940	50100	08/08/2016	Pending	4,202.24 USD	[Select Action] Go

RequesterGrindstaff, Bonnie (VDOT)

Entered ByGrindstaff, Bonnie (VDOT)

PriorityMedium

Requisition

Approvals

Inventory

Purchase Orders

Change Request

Receiving

Returns

Invoice

Payment

Request Lifespan:

Line Information

Personalize | Find | First 1 of 1 Last

Line	Description	Status	Price	Quantity	UOM	Supplier	
1	COLD MIX, ASPHALT	Pending Approval	5.36000 USD	784.0000 BG	Seaboard Asphalt Products Co		

0002175937

RESTOCK 21A FOR ARLINGTON

50100

08/08/2016

PO(s) Dispatched

1,826.48 USD

[Select Action]

Go

0002175934

0002175934

50100

08/08/2016

Pending

1,800.00 USD

[Select Action]

Go

0002175913

0002175913

50100

08/08/2016

PO(s) Dispatched

7,500.60 USD

[Select Action]

Go

0002175905

SNOW 2016

50100

08/08/2016

Pending

8.00 USD

[Select Action]

Go

0002175902

0002175902

50100

08/08/2016

Pending

14,169.90 USD

[Select Action]

Go



Maintaining a Requisition: eProcurement Module

(continued)

When you expand a line you see a pictorial representation of the requisition's lifespan and status. Each active (blue) icon is a hyperlink to the document associated to the requisition (purchase order, receipt, etc.). Click on an active icon, to view the details. Click on the **Requisition** icon. The **Requisition Details** page is displayed.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit50100

Requisition ID

Date From11/01/2016

RequesterPPS1_HELEN.ARD

Requisition Name

Request StateAll but Complete

Date To12/30/2016

Entered By

PO ID

Search

Clear

Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Total	
0002175953	0002175953	50100	12/29/2016	Open	28.00 USD	[Select Action] Go
0002175952	0002175952	50100	12/29/2016	Pending	28.00 USD	[Select Action] Go

Requester ARDMAN, HELEN

Entered By ARDMAN, HELEN

Priority Medium

Requisition

Approvals

Inventory

Purchase Orders

Change Request

Receiving

Returns

Invoice

Payment

Request Lifespan:

Line Information

Personalize

Find

First

1-3 of 3

Last

Line	Description	Status	Price	Quantity	UOM	Supplier		
1	ABRASIVES, PLASTONE ABRASIVE...	Pending Approval	0.01000	USD	500.0000	EA	E & M Auto Paint and Supply Corp	✗
2	ABRASIVES, SILICON CARBIDE (...)	Pending Approval	0.01000	USD	2,000.0000	EA	E & M Auto Paint and Supply Corp	✗
3	POINTERS AND PARTS, LEAD ABR...	Pending Approval	0.01000	USD	300.0000	EA	MBC PRECISION IMAGING	✗

0002175951

Helen Express ePro

50100

11/17/2016

Pending

0.01 USD

[Select Action]

Go

0002175950

0002175950

50100

11/17/2016

Open

50.00 USD

[Select Action]

Go

Create New Requisition

Review Change Request

Review Change Tracking

Manage Receipts

Requisition Report

86



Maintaining a Requisition: eProcurement Module

(continued)

On the **Requisition Details** page, if comments were added to the requisition they will be displayed in the **Requisition Summary** section.

In the **Requisition Lines** section, click on the **Expand** triangle icon next to a line to view the shipping details for the line. You may also expand the **Accounting Lines** to view the accounting distribution details.

If associated to a contract, there will be a **Contract Information** hyperlink. Click on it to drill down to the contract details.

Navigate to edit the requisition by clicking on the **Edit Requisition** button at the bottom of the page.

The requisition will open in the module it was created in i.e., eProcurement or Purchasing.

Use the **Return to Manage Requisitions** hyperlink to navigate back the **Manage Requisitions** page.

Requisition Details

Requisition Summary

Business Unit

50100

Requisition Name

0002175952

Date

12/29/2016

Requisition ID

0002175952

Request State

Pending

Total Amount

28.00 USD

Requested For

PPS1_HELEN.ARDMAN

Expand lines to review shipping and accounting details

Requisition Lines

Line

Item Description

Source

Status

Amount Only

Quantity

Price

Status

Total

1

ABRASIVES, PLASTONE ABRASIVE...

Not Source

No

500.0000

Each

0.01000

USD Pending 5.00

Shipping Line

1

Ship To

CNTRL OFF3
VDOT Central Office
1221 E. Broad St.
Richmond, VA 23219

Quantity

500.0000

Price

0.01000

Price Adjustment

Attention To

ARDMAN, HELEN

Due Date

Accounting Lines

Distribute By Qty

Liquidate By Amt

Accounting Lines

Personalize | First 1 of 1 Last

Details

Mgre Details 2

Asset Information

Dist #

Status

Location

Req Qty

Merchandise Amt

Percent

GL Unit

Entry Event

Account

Fund

Program

Department

1

Open

CNTRL OFF3

500.0000

5.00

100.0000

50100

5012550

04100

099001

10003

2

ABRASIVES, SILICON CARBIDE (...)

Not Source

No

2,000.0000

Each

0.01000

USD Pending 20.00

3

POINTERS AND PARTS, LEAD ABR...

Not Source

No

300.0000

Each

0.01000

USD Pending 3.00

Edit Requisition

Return to Manage Requisitions



Maintaining a Requisition: eProcurement Module

(continued)

If active, i.e., blue, click on the **Approvals** icon from the lifespan on the **Manage Requisitions** page to view the status of the approvals for the selected requisition.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit50100

Requisition ID

Date From11/01/2016

RequesterPPS1_HELEN.ARD

Requisition Name

Request StateAll but Complete

Date To12/30/2016

Entered By

Search

Clear

Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Total	
0002175953	0002175953	50100	12/29/2016	Open	28.00 USD	[Select Act]
0002175952	0002175952	50100	12/29/2016	Pending	28.00 USD	[Select Act]

Requester ARDMAN, HELEN

Entered By ARDMAN, HELEN

Priority Medium

Requisition

Approvals

Inventory

Purchase Orders

Change Request

Receiving

Returns

Inv

Request Lifespan:

Line Information

Line	Description	Status	Price	Quantity	UOM	Supplier
1	ABRASIVES, PLASTONE ABRASIVE...	Pending Approval	0.01000	500.0000	EA	E & M Auto Paint s
2	ABRASIVES, SILICON CARBIDE (...)	Pending Approval	0.01000	2,000.0000	EA	E & M Auto Paint s
3	POINTERS AND PARTS, LEAD ABR...	Pending Approval	0.01000	300.0000	EA	MBC PRECISION

0002175951

Helen Express ePro

50100

11/17/2016

Pending

0.01 USD

[Select Act]

0002175950

0002175950

50100

11/17/2016

Open

50.00 USD

[Select Act]

Approval Status

Business Unit 50100

Requisition ID 0002175952

Requisition Name 0002175952

Requester ARDMAN, HELEN

Entered on 12/29/2016

Status Pending

Priority Medium

Total Amount 28.00 USD

Requester's Justification

No justification entered by requester.

View printable version

Line Information

Review/Edit Approvers

Req for Supervisor Action

Requisition 0002175952:Pending

Req - Requester's Supervisor

Pending

MCCRACKEN, STACY

Requester's Supervisor

Req for Procurement Mgr Action

Requisition 0002175952:Awaiting Further Approvals

Req - Procurement Manager

Not Routed

Multiple Approvers

Approval Assignment to Buyer

Return to Manage Requisitions

Requisitions can be maintained in either the eProcurement module or the Purchasing module, regardless of which module was used to create the requisition.

- ☐ True
- ☐ False

You cannot cancel a requisition after the requisition has been approved.

- ☐ True
- ☐ False



Lesson 4: Summary

In this lesson, you learned how to:

- Maintain a requisition using the Purchasing module
- Maintain a requisition using the eProcurement module



Lesson 5: Processing Requisitions Hands-On Practice

This lesson includes practice that will reinforce the lessons learned today. Your instructor will provide direction regarding specific activities that are part of this lesson. Please ask your instructor if you have any questions.





Course Summary

In this course, you learned how to:

- Describe requisition concepts, processes, integration, and interfaces.
- Create and submit a requisition in the Purchasing and the eProcurement modules.
- Maintain a requisition in the Purchasing and the eProcurement modules.



Course Evaluation

Congratulations! You successfully completed the **501 PR342: Processing Requisitions** course. Please use the evaluation link to assess this course.

[Click here to access the survey](#)

Once you have completed and submitted the survey, close the survey window. To close the web based training course, click the 'X' button in the upper right corner.





Appendix

- Key Terms
- Flowchart Key



Key Terms

Accounting Distribution: ChartField string that defines how a transaction is charged (i.e., which fund, program department, account, etc.).

Buyer: A Buyer is an Individual authorized to create a purchase order.

eProcurement module: The eProcurement module provides a web-based solution, similar to a shopping cart experience, for the activities associated with requesting goods and services.

Favorite Item: Favorites are items frequently ordered that a user can maintain in a single location. Cardinal automatically builds this list showing the last date the item was requested and the number of times the item has been requested. You can manually add to this list of frequently ordered (favorite) items and use the list to add items to a requisition without searching the item catalog.

General Ledger: The module that contains all the accounts (e.g., Budget, Actuals, Modified Accrual, Full Accrual, and Cash) used to track accounting transactions. The General Ledger serves as the basis for the preparation of financial statements.

Item: An item represents the goods or services provided by supplier. There is a unique identifier for each item. Items are important for analyzing the total purchase and facilitate the negotiation of a contract with a supplier and Strategic Sourcing activities.

Item Category: Groups of similar items. Cardinal allows for the definition of item categories, which can greatly reduce the repetitive tasks associated with service and material purchases.

Procurement: Procurement is the principles, standards, and guidelines related to public purchasing.



Key Terms (continued)

Project: A project is a structure used to track costs, generally over an extended period of time. It generally has a finite beginning and end. Typically it requires both fiscal year and life to date budget and actual reporting (e.g., Upgrade signal at Harry Byrd Hwy & Sterling Blvd is **0000094859**).

Purchase Order: A purchase order is a commitment from an agency to a supplier to purchase goods or services from that supplier. It lists purchase information, such as item, quantity, freight terms, shipping terms, payments terms, and shipping instructions, and is part of the contractual nature of the purchase order.

Purchasing Module: The Purchasing Module facilitates the buying of goods and services and the processing of requisitions. Purchasing is the actual transaction between an agency and a supplier.

Req Sourced from Contract: This step identifies whether a contract has already been established with the supplier.

Requisition: A requisition is the request for items or services. A requisition is an online form that you use to request goods or services. Requisitions can be created from the eProcurement or Purchasing module.

Schedule: The schedule defines when and where you want the line items delivered. Schedule is under the **Ship To / Due Date** tab in the **Line** section of the requisition. The schedule includes the **Due Date**, the **Ship Date**, and the **Ship To** location for the goods. One schedule can include many lines (individual items each with its own description and price).

Sourcing: Sourcing is the process of creating purchase orders from requisitions.



Key Terms (continued)

SpeedChart: A shorthand key that automatically populates some ChartFields in one or more accounting distributions.

Storekeeper: The person(s) responsible for handling orders placed via Cardinal and being filled by WebIMS. The District Storekeeper orders, receives, and issues WebIMS stock.

Strategic Sourcing: Strategic sourcing refers to the process of determining the best suppliers for needed goods and/or services, and the conditions under which you award them your business. The Strategic Sourcing module allows end users to create and/or award bids, proposals, purchase orders, and contracts in Cardinal.

Submit Requisition for Approval: When the requisition has all the required item lines and additional data entered, the Requisitioner submits the requisition for approval.



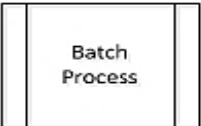
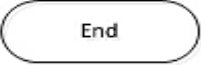






Supplier: Any person or other entity that provides goods and/or services, or receives refunds, including suppliers, federal, state, or local government entities, and other fiscal payees. All procurement suppliers are interfaced from eVA to Cardinal. Non-procurement suppliers (also called Fiscal Payees) will be created directly in Cardinal. Employees are not suppliers for their own agencies.

Template: A template provides a quick way to create a requisition using previous requisition information.

WebIMS: WebIMS is a custom order fulfillment solution used specifically to order goods such as safety gear, salt or sand for snow treatment, etc. When this type of good is ordered, Cardinal interfaces with WebIMS to fulfill that order.



Flowchart Key

Flowchart Key			
	Depicts a process step or interface.		Indicates point at which the process begins. Does not represent any activity.
	Specifies a batch process.		Indicates point at which the process ends. Does not represent any activity.
	Depicts a process step that is performed manually.		Depicts a document of any kind, either electronic or had copy.
	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.		Indicates an On-Page or Intra Process Connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
	Represents an entity (person, organization, etc.).		Connects steps between business processes.



End of Appendix

Congratulations! You successfully completed the appendix section of **501 PR342: Processing Requisitions** course.

To close the web based training course, click the 'X' button in the upper right corner.

